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ABSTRACT

A privately funded educational choice model is presented in this document, which is based on the experiences of four privately funded programs in Indianapolis (Indiana), San Antonio (Texas), Milwaukee (Wisconsin), and Atlanta (Georgia). The model is designed to help interested persons or organizations establish a privately funded educational choice program in their community. Section 1 offers information on defining the program's focus. Section 2 outlines seven common denominators shared by the four programs. The following programs are described: the CHOICE Trust (Indianapolis); The Children's Educational Opportunity (CEO) Foundation (San Antonio); Partnership for Educational Choice (Milwaukee); and the Children's Educational Foundation (Atlanta). The third section presents steps for identifying critical local issues through data collection, such as private and public school surveys. Sections 4 through 7 offer guidelines for designing the program, recruiting partners, selecting data processing programs, and utilizing a public relations firm. A flowchart and sample timeline are provided in the eighth section. Sections 9 through 11 offer tips for preparing the announcement and handling of public response, handling operational difficulties, and evaluating the program. A list of contact persons is provided in the final section. Appendices contain individual program forms, a sample private school survey, the administrator's job description, an empowering document, data processing reports, a sample request for proposal (RFP) form, and sample press releases and announcements. (LMI)

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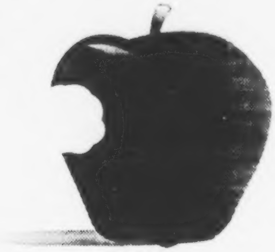
Educational Choice

A Privately Funded Model



SCHOOL CHOICE WITH A BITE

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INTRODUCTION

In the summer of 1991, after an educational choice bill failed in the Indiana state legislature, J. Patrick Rooney, Chairman of the Golden Rule Insurance Company of Indianapolis, developed an idea for a privately funded educational choice experiment. Two weeks later, and in time for the fall semester, he announced the formation of the CHOICE Charitable Trust which attracted the immediate attention of both the educational and at-large community.

Three weeks after the Indianapolis announcement Dr. James Leininger of San Antonio, a man who, like Pat Rooney, is intensely interested in educational issues, read an editorial about the CHOICE Trust in the Wall Street Journal. Through the Texas Public Policy Foundation, for which Dr. Leininger serves as Chairman, and with two other corporate "founding partners" the same basic educational choice program was announced for San Antonio for the fall 1992 semester. It's name: The Children's Educational Opportunity (CEO) Foundation.

On June 11, 1992, within sixty days of San Antonio's announcement, Milwaukee, Wisconsin became the third city to join this highly unique movement by unveiling the Partnership for Educational Choice by Partners Advancing Values in Education (PAVE).

Exactly two months after Milwaukee entered the choice movement Atlanta announced its program entitled Children's Educational Foundation. Like San Antonio, the Atlanta program's beginnings were as an initiative of a public policy think tank—the Georgia Public Policy Foundation.

The common and the uncommon denominators of these four programs should be of great importance to those considering joining the educational choice movement. This prototype document includes a section entitled Program Models which offers the reader such an analysis.

In May, 1992 officials from the two existing programs—the CHOICE Trust and the CEO Foundation—gathered in Indianapolis on the occasion of the completion of that program's first year. The outcome of that meeting was an agreement to undertake a cooperative effort by which the two cities would join efforts in organizing a national "roll out" of the privately funded CHOICE concept directed by the Texas Public Policy Foundation. This model is the tangible result of that meeting.

The purpose of this model is to set forth a working template by which any interested person can take these ideas and procedures, identify and strategically consider their particular local critical issues, and (hopefully!) launch a similar program of their own. It is the hope of all who contributed to this document that the reader will find herein most of the answers of how to establish their own educational CHOICE foundation for the benefit of their communities.

The goal for this national "roll out" effort is to provide the requisite momentum to a national debate on educational choice by establishing twenty-five privately funded CHOICE programs across the country by the fall semester of 1994. To that end the map that follows shows the existing programs, the cities that have expressed an interest in establishing SCHOOL CHOICE WITH A BITE, and other targeted cities.

ABOUT THE AUTHOR

Robert B. Aguirre is a San Antonio businessman who has both a management consulting practice and a commercial real estate firm while serving as the Managing Director of the Children's Educational Opportunity (CEO) Foundation . With the cooperation of Indianapolis' CHOICE Trust he designed the first replication of the privately funded concept. He serves on the board of directors of the CEO Foundation as well as the advisory board to a research team from the University of North Texas in a longitudinal study of school CHOICE. Those wishing to contact him directly may write Post Office Box 15039, San Antonio, Texas, 78212. Or he may be reached by telephone at (210) 299-1172.

ACKNOWLEDGEMENTS

The author has many people to thank for the development of this model. First among them must be the Texas Public Policy Foundation and Fritz S. Steiger. It was their initiative that lead to the vision to develop a formal mechanism by which the privately funded CHOICE concept can be replicated with some standardization, ease and cost effectiveness.

Additionally, a man who has become a dear friend and for which the author holds in highest regard - J. Patrick Rooney - is owed a great depth of thanks in setting the precedence of unlimited availability of data, procedures and forms not to mention his time, talent and treasures. Indeed this policy of accessibility has already proven crucial to the beginnings of a successful national "roll-out" effort.

So many people contributed to this endeavor that surely some one will be left unrecognized. For these oversights the author sincerely apologizes. But among those who did contribute their time and energies were Daniel M. McKinley of PAVE, Patsy O'Neill of the CEO Foundation(who assisted greatly with the editing of this model), Matthew J. Glavin of the Children's Educational Foundation, and finally the original trailblazer, Timothy Ehrgott of Indianapolis' CHOICE Trust. These individuals have the great responsibility to make their respective programs work each and every day. Their pioneering "hands on" experience is reflected in these pages and should serve as a great help to all who seek to follow in their historic footsteps.

A special note of thanks is also due to John O'Neill who, through a great act of generosity, gave of his time and talents to develop the specific data processing components which are offered in this model. Also thanks to Michael Watson for the design of logos and materials used by the CEO Foundation and for the design of this manual.

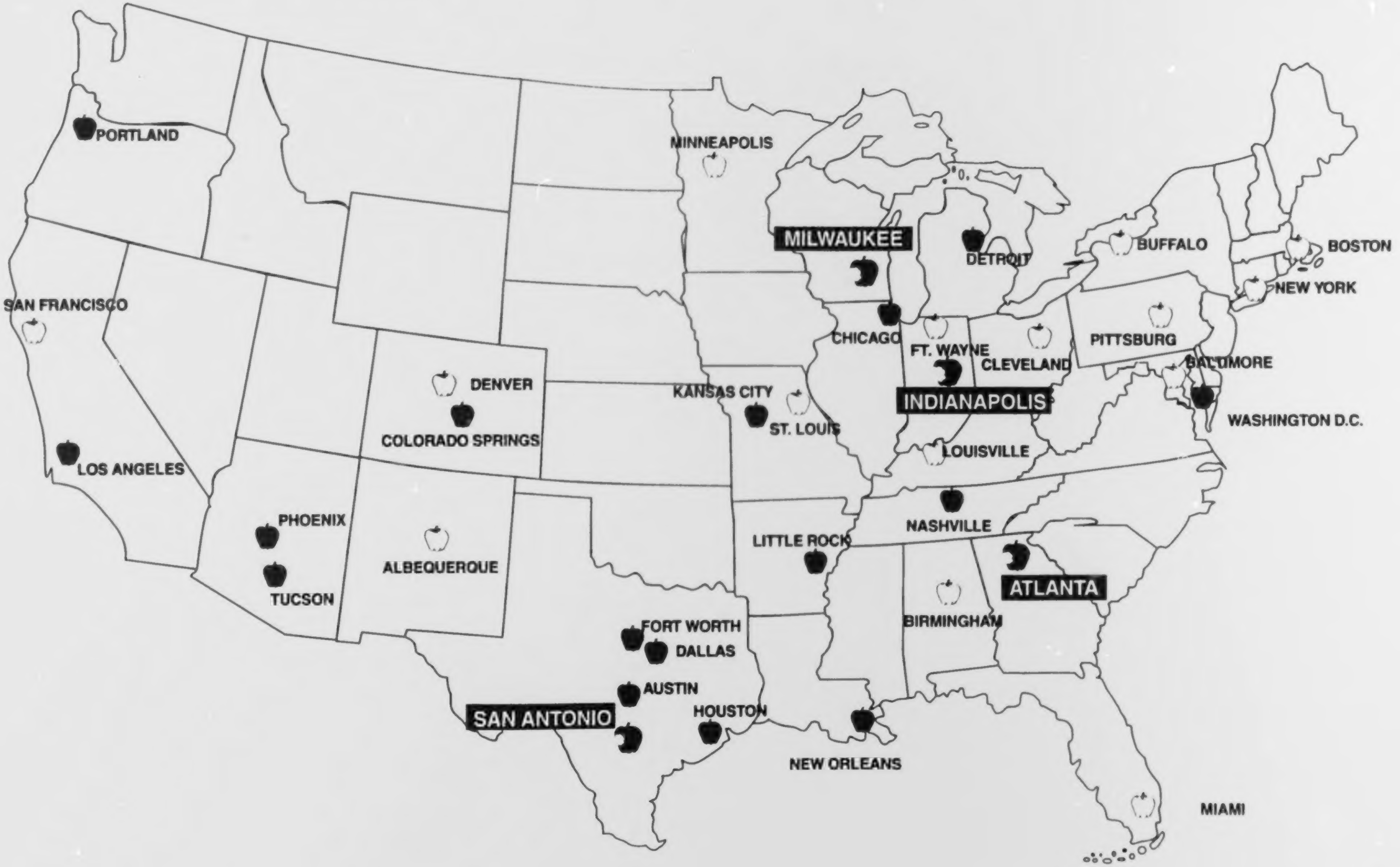
Finally no great vision is ever consummated without recognizing the financial realities associated thereto. The concept of educational CHOICE, as great and as powerful as it is, is no different. For their financial underwriting of this historic national roll-out initiative, beginning with the development of this privately funded choice model, the author wishes to acknowledge and thank the FAMESA CORPORATION. Their generosity and their courage may prove to forever change the course of the lives of many of our nation's children—today and tomorrow.

DISCLAIMER AND AUTHORIZATION TO REPRODUCE

The information presented herein is done so for the purpose of assisting any interested person or organization in establishing a privately funded educational choice program in their community. It is the compilation of the experiences and reflections of the existing programs in Indianapolis, San Antonio, Milwaukee and Atlanta. Every effort has been made to present the best and most up-to-date information, however no warranty of any kind is made or implied. The reader is advised to carefully analyze all aspects of their local situation before proceeding with organizational efforts.

Any part of this document or its appendices may be reproduced, used or otherwise adapted for purposes of replicating a local choice program. All other uses and purposes should first seek permission from the author.

THE EXPANSION OF PRIVATELY FUNDED CHOICE PROGRAMS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MINNEAPOLIS
MILWAUKEE
DETROIT
BUFFALO
BOSTON
NEW YORK
SAN FRANCISCO
CHICAGO
FT. WAYNE
CLEVELAND
PITTSBURG
BALTIMORE
DENVER
KANSAS CITY
ST. LOUIS
INDIANAPOLIS
WASHINGTON D.C.
COLORADO SPRINGS
LOS ANGELES
LOUISVILLE
NASHVILLE
PHOENIX
LITTLE ROCK
ALBEQUERQUE
ATLANTA
TUCSON
FORT WORTH
BIRMINGHAM
DALLAS
AUSTIN
HOUSTON
SAN ANTONIO
NEW ORLEANS
MIAMI

◕ CITIES WITH PRIVATELY FUNDED CHOICE PROGRAMS

● CITIES INTERESTED IN PRIVATELY FUNDED CHOICE PROGRAMS

○ TARGETED CITIES

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SECTION ONE

DEFINE THE PROGRAM FOCUS

If anything has been learned from educational CHOICE experiences so far it is that a clearly defined and articulated definition of a program's focus is necessary. This may sound like an over-simplification but its importance can not be stressed enough.

The key to the successful articulation of a program's focus is that it must be such that no one can argue against it. To simply say, for example, that your program's focus is to promote educational choice makes for a very attackable and debatable purpose. On the other hand to say that your program's focus is to provide educational opportunities for low-income children makes for a much different setting. In this instance critics of your efforts—and there will be some—will have little to argue against. While potential detractors may be no less critical of your efforts, they will be powerless to speak too publicly against such a noble cause. This focus will therefore prove to be greatly important.

The significance of this program focus can not be stressed enough for it will affect almost every aspect of your future efforts. How you express your purpose will impact, among other things, on how well your idea is received by potential donors. No small consideration indeed! To a large extent it also determines the quantity and quality of media coverage you will receive and this too must be considered vitally important. If the purpose statement is too wordy, too complex or too lengthy the media will not do a good job in communicating it to the public.

Anyone who is considering taking the first step toward replicating this CHOICE concept is encouraged to carefully review the Questions and Answers document published by each of the four existing programs (these can be found in the APPENDICES). The first page in each document deals with the question of focus/purpose. This expression of purpose sets the tone for everything that is subsequently done or said. It therefore deserves the highest level of consideration and thoughtfulness.

Because the focus statement is so important it must be well developed prior to approaching potential "founding donors" who will surely ask "why". But there is a pitfall here in that you do not want to exclude your founders from having input opportunity into this all important statement. This will therefore be an issue necessitating some tact and diplomatic skill. If they are going to support the program financially they will need to feel comfortable with it. They will feel comfortable with it if they have input into its basic development.

To assist in developing a program focus, the central theme of the four existing programs are offered here for review and comparison. The similarities are no accident!

THE CHOICE TRUST - INDIANAPOLIS

"Our aim is to help moderate and low-income families offset the cost of tuition at the private school of their choice. Today, only well-to-do parents can choose the school that best meets their child's needs. It isn't fair that the economically disadvantaged families in our society lack that option. We want to change this by offering more parents the opportunity to get the best education for their children."

THE CHILDREN'S EDUCATIONAL OPPORTUNITY (CEO) FOUNDATION - SAN ANTONIO

"The purpose of the CEO Foundation is to assist in equalizing educational opportunities for Bexar County elementary school students by offering low-income families an educational option normally denied them because of cost."

PARTNERSHIP FOR EDUCATIONAL CHOICE - MILWAUKEE

"The Partnership for Educational Choice aims to help low-income families with children in grades K-8 offset the cost of tuition at the private school of their choice, through a simple program of tuition assistance. We believe that all families, regardless of economic circumstances, deserve equal access to educational opportunities for their children. We also believe that parents are the primary educators of their children, who deserve -- and are capable of exercising -- full and free choice among the broadest possible range of educational alternatives."

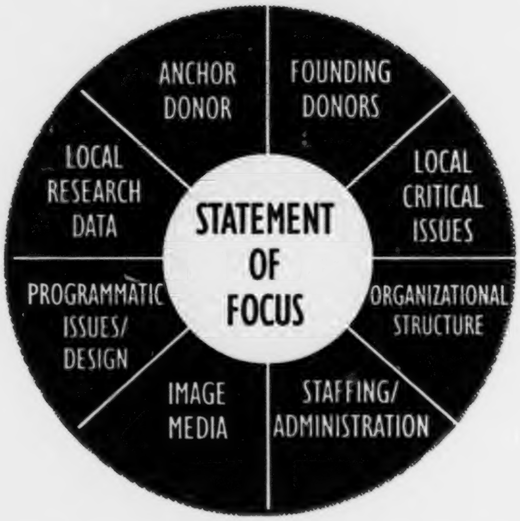
CHILDREN'S EDUCATIONAL FOUNDATION - ATLANTA

"The goal of the Children's Education Foundation (CEF) is to help provide low-income families with a full range of educational options....By providing funds to assist poor families to attend non-public schools, the Children's Education Foundation hopes to expand equality of opportunity in education."

CONCLUSION

The importance for a new program having a clear sense and expression of focus can not be stressed enough. From this point on all decisions - and there will be many - will draw their direction and their strength from this statement. Therefore the quality of the various programmatic components is directly determined by the clarity of and the commitment to this focus. This is clearly illustrated by the following chart:

Critical Project Components



SECTION TWO

PROGRAM MODELS

As of this writing four cities have a privately funded educational choice program in place. Each of these receives calls daily from across the country from persons interested in receiving information on how the program works and how best to go about setting one up.

The four existing programs are identical in their basic design. Variations occur in order to accommodate local situations and needs as is appropriate. THE GREAT COMMON DENOMINATOR OF THE FOUR EXISTING PROGRAMS IS THEIR SIMPLICITY. Next to having a strong conceptual focus, as discussed in the previous section, the next most important characteristic must surely be simplicity.

THE BASIC MODEL

The basic program model consists of a privately funded trust or foundation whose general purpose is to institute an educational choice component in their community through a scholarship or voucher program as follows:

1. The program is open to children whose families qualify for assistance under the federal school lunch program.
2. A voucher recipient is guaranteed a minimum of three years of assistance provided they stay in a local school and the parents pay their portion of the tuition.
3. There are no academic qualifications to enter or to remain in the program. Participation is strictly on a first come first served basis.
4. The basic formula for scholarship award is one-half of the tuition amount up to a "cap".
5. The family can chose whichever school they feel best suits their child's needs.
6. Eligibility is restricted by some identified geographic boundary.
7. Fifty percent of the scholarships (either dollars or "slots") are made available to families who have already been exercising educational choice (principally meaning existing private schoolers) and fifty percent to families wishing to exercise educational choice for the first time. (The exception to this is the Atlanta program where they have a policy of one-third, two thirds respectively.)

It is important to point out that aside from these common denominators each of the four programs have their own particular characteristics which are brought about by local needs, donor preferences or other reasons. These specific programmatic differences are perhaps not quite as important as the reasons for which they exist. Therefore a potential program is wise to carefully consider all of their local critical issues. The section that follows - Critical Local Issues and Data Gathering is presented for that purpose.

A potential program should analyze carefully the specific programmatic design features of each of the four cities. To assist the reader in this effort each program's documents are included in the appendix of this report (APPENDICES 1-4).

It may be helpful to look at a historical overview of the four programs that are currently in operation. All four share the basic characteristic of simplicity as well as the seven items listed above. Following this overview is a matrix which comparatively sets forth some important characteristics of these programs.

THE CHOICE TRUST - INDIANAPOLIS

The CHOICE Trust was founded by J. Patrick Rooney, Chairman of the Golden Rule Insurance Company, in August 1991. From the time Mr. Rooney decided to proceed with his idea to the time it was announced was a mere two weeks. What's more that announcement came only two weeks before school started!

The CHOICE Trust was started solely by Golden Rule with a financial commitment of $400,000 a year for three years as a result of a failed legislative attempt to institute educational choice in their state. Other supporters joined the effort as the program advanced and they now boast forty-five donors. Their original target was to help 500 children. As of press date they have 925 children in their program.

Of the $1,200,000 committed by Golden Rule all is to be used directly for scholarships. The corporation is absorbing the administrative expense of the program, and they are utilizing their corporate office to house and manage the program.

The CHOICE program has proven to be somewhat controversial since it was done in response to a highly contested and widely publicized unsuccessful legislative effort. Additionally the program has had a difficult time generating local media coverage of its efforts and accomplishments. Ironically they have had decidedly more success in garnering national and regional media coverage.

The CHOICE Trust board of directors is made up of nine community and business leaders who meet bi-monthly. The program's Executive Director/Administrator is Timothy Ehrgott.

The Golden Rule's Choice Trust program is the standard by which all others are compared. When "differences" in other programs are discussed it is almost always meant as compared to Indianapolis.

THE CHILDREN'S EDUCATIONAL OPPORTUNITY (CEO) FOUNDATION - SAN ANTONIO

The CEO Foundation was founded by Dr. James Leininger, M.D., Chairman of KCI, Inc. after reading an article in The Wall Street Journal about the Indianapolis program. He asked that the Texas Public Policy Foundation, a conservative think tank for which he also serves as chairman, develop a local replication as an educational initiative. San Antonio announced its program in April 1992.

The CEO Foundation began with three "founding partners" (The KCI Foundation, USAA Federal Savings Bank, and the San Antonio Express-News) with a financial commitment of $500,000.00 a year for three years. To date only one other corporate supporter has joined the effort. Their original target was to help 700 children. As of press date they had 915 children in their program.

Of the $1,500,000 committed by the San Antonio donors all is to be used directly for scholarships as the Texas Pubic Policy Foundation is absorbing the administrative expense of the program.

The San Antonio CHOICE program has proven to be not-at-all controversial. While still in its planning stage San Antonio approached the largest daily circulation newspaper in the city to be a founding partner. So important was their "buying into the program" that the CEO organizers did not ask them for cash, but rather for space in their newspaper (they pledged a minimum of $75,000 in space). This move proved to be a great one for CEO in being able to spread its message and in setting the right image for the program. CEO has had decidedly less success in garnering national and regional media coverage.

The CEO Foundation felt that, since the program is first come first served, it was imperative that the news of the program be distributed quickly and accurately. Also it was important that all interested parents had equal and immediate access to the necessary application form. The newspaper partner's role was to assist in this important area. Not only did the program get excellent news coverage but the application forms themselves were published in large "ads". Equal accessibility was therefore achieved.

One other very important conceptual difference was highlighted in the CEO program as a key tactical decision: Public schools were welcomed to participate. If they were willing to take an intra- or inter-district transfer student for a tuition charge, and the public school was the parent's choice, they were welcomed to participate and the CEO Foundation was willing to pay under their stated terms. (Of the fifteen independent school districts in Bexar County only one accepts such transfers as a matter of standard policy). As expected ten children applied to attend a public school which in itself spoke volumes.

The CEO board of directors is made up of Dr. James Leininger, Fritz Steiger, of the Texas Public Policy Foundation, and Robert Aguirre who serves as the managing director. The program's Executive Director/Administrator is Patsy O'Neill. The CEO Foundation is housed at the offices of the Texas Public Policy Foundation.

PARTNERSHIP FOR EDUCATIONAL CHOICE - MILWAUKEE

The Partnership for Educational Choice was founded by Partners Advancing Values in Education (PAVE) and boasted a financial commitment of $500,000 per year for three years from the Lynde and Harry Bradley Foundation. Additionally the program had support from a variety of leading Milwaukee corporations, foundations and individuals who collectively contributed over $78,00o in initial start-up funds.

Milwaukee has stratified targets for their grant awards as follows:

1993 = 1,000 Students
1994 = 1,100 Students
1995 = 1,200 Students
1996 = 1,300 Students

Their plan is to accomplish these numbers by conducting an active fund raising campaign to augment the Bradley Foundation's initial investment.

PAVE's program is organized such that the necessary administrative expenses come out of the funds raised.

The Milwaukee situation is unique in that they also have a legislatively created choice program in existence. The Milwaukee School Parent Choice program created by a bill sponsored by State Representative Polly Williams is generally not considered to be a full-fledged system of choice. Under that program a small number of qualifying parents are permitted to choose among a handful of "qualifying" schools in the city - none of which may be religiously oriented in any way.

The board of directors of the PAVE program is quite an impressive array of twenty individuals including two CEO's of major corporations as co-chairs. All other members are likewise CEO's or major officers in their organizations including a Roman Catholic Archbishop.

The program is headed by Daniel M. McKinley of PAVE and is housed in the PAVE offices.

CHILDREN'S EDUCATIONAL FOUNDATION - ATLANTA

The Atlanta program is the newest CHOICE program as of press time, having been announced on August 10, 1992. As an initiative of the Georgia Public Policy Foundation, a conservative think tank, it began with a fund of $1,000,000 from a single donor.

The most significant design "departures" of this program are in two areas. First, the maximum or "cap" amount is far greater than any of the other choice programs at $3,000 per student per year. Second, the board of directors is made up of representatives of the beneficiary group. That is to say parents whose children are in the program.

Another interesting aspect of the Atlanta program is that they employ the services of an outside company to handle the mechanics of the monthly voucher payments. In doing so the program cuts only one check per month to that private service who in turn issues vouchers to the parents, who in turn tender it to the school in lieu of cash. The school then "deposits" the voucher with the private service who then transfers to the school the corresponding amount of cash.

The CE Foundation is housed in and administratively supported by the Georgia Public Policy Foundation managed by Matthew J. Glavin.

At the end of this section appears a comparative matrix of these four programs. The reader will be well advised to carefully study the differences and consider the reasons for their existence. Listed within the matrix are the names and phone numbers of the administrators/executive directors for your convenience. Interested persons are urged to contact these persons and avail themselves of their experience.

A more detailed analysis of each program can be achieved by reviewing each program's forms and published documentation as they appear in the appendix.

Again it is important to state that there will always be legitimate departures from the basic CHOICE model. These differences are brought about by a careful analysis of what the local situation demands, the preferences of the donors, and the particulars of the local education environment. Much thought and research should be invested in every aspect of a contemplated program.

PRIVATELY FUNDED CHOICE PROGRAMS...A COMPARATIVE MATRIX

CHARACTERISTICS	INDIANAPOLIS	SAN ANTONIO	MILWAUKEE	ATLANTA
PROGRAM NAME/ADDRESS/PHONE	CHOICE TRUST 7440 WOODLAND DRIVE INDIANAPOLIS, IN. 46278-1719 (317) 297-4123	CHILDREN'S EDUCATIONAL OPPORTUNITY FOUNDATION P.O. BOX 17447 SAN ANTONIO, TX. 78217 (512) 829-0305	PARTNERSHIP FOR EDUCATIONAL CHOICE P. O. BOX 07912 MILWAUKEE, WS. 53207-0912 (414) 747-1505	CHILDREN'S EDUCATIONAL FOUNDATION 2900 CHAMBLEE-TUCKER ROAD ATLANTA, GA. 30341-4128 (404) 455-7600
ADMINISTRATOR/EX. DIR.	TIMOTHY EHRGOTT	PATSY O'NEILL	DANIEL McKINLEY	MATTHEW GLAVIN
BEGINNING CASH FUND	$1,200,000.00	$1,515,000.00	$1,638,300.00+	$1,000,000.00
TIME FRAME - DECISION TO ANNOUNCEMENT DATE	TWO WEEKS	FOUR MONTHS	ONE YEAR	TWO MONTHS
FIRST YEAR TARGET	500 STUDENTS	700 STUDENTS	700 STUDENTS	200 STUDENTS
CURRENT NUMBER ENROLLED	925 STUDENTS	860 STUDENTS	NOT YET AVAILABLE	179 STUDENTS
FIRST YEAR ADMIN. BUDGET	$ N/A	$30,000	$138,300.00	$ 28,000.00
PUBLIC SCHOOLS INCLUDED	NO	YES	NO	YES
NUMBER OF SCHOOLS ELIGIBLE	71	91	96	50
NUMBER OF SCHOOLS PARTICIPATING	60	77	88	36
MAXIMUM AMOUNT OF GRANT	$800.00	$750.00	$1,000.00	$3,000.00
GRADES ELIGIBLE	K-8	1-8	K-8	K-8

PRIVATELY FUNDED CHOICE PROGRAMS...A COMPARATIVE MATRIX

CHARACTERISTICS	INDIANAPOLIS	SAN ANTONIO	MILWAUKEE	ATLANTA
GRANT PAYMENT FREQUENCY	MONTHLY	MONTHLY	ONCE PER SEMESTER	MONTHLY
YEARS COMMITTED	3	3	5	4
MEDIA PARTNER	NO	YES - SAN ANTONIO EXPRESS-NEWS CORP.	NO	NO
HOW APPLICATIONS DISTRIBUTED	PRIVATE SCHOOLS	NEWSPAPER ADS AND PRIVATE SCHOOLS	COMMUNITY CENTERS AND PUBLIC LIBRARIES	TELEPHONE/ MAIL/HOUSING AUTHORITY
USED ONE APPLICATION FORM FOR PARENT AND SCHOOL	YES	NO	YES	YES
P/R OR IMAGING FIRM ENGAGED	NO	YES	YES	NO
RESEARCH OR OTHER EVALUATION MECHANISM EMPLOYED	YES	YES	YES	NO
BY WHOM	HUDSON INSTITUTE	UNIVERSITY OF NORTH TEXAS	WISCONSIN RESEARCH POLICY INSTITUTE	N/A
RESEARCH COST	NOT YET AVAILABLE	$280,000.00	$ 36,000.00	N/A
DATA PROCESSING HARDWARE	PC SYSTEM PC SYSTEM	PC SYSTEM	PC SYSTEMS	PC SYSTEMS
DATA PROCESSING SOFTWARE	ALPHA 4	DISBURSEMENTS - QUICKEN DATA BASE - PARADOX	EXCEL	PARADOX

SECTION THREE

Critical Local Issues and Data Gathering

The importance of identifying critical local issues through the gathering of strategic data can not be over emphasized in terms of its impact on the success of a new program. The purpose of this section is to assist those interested in organizing a private voucher effort in how to approach this very critical aspect.

This section deals with the identification of local issues and data gathering in a step-by-step fashion. However the reader is cautioned that, while the mere gathering of data can be considered simple enough, the strategic evaluation of that data is anything but!

Prior to beginning work on a potential program in earnest it is highly recommended that this basic organizational research be carefully conducted. To do so can save some very unpleasant surprises later on, BUT THE AUTHOR HAS ONE WORD OF CAUTION PRIOR TO BEGINNING THIS PROCESS AND THAT WORD IS "CONFIDENTIALITY".

While it is certain that every program will have its own approach and it own features it is safe to say that every program would do well to conduct its entire developmental stage in total secrecy. The importance of this can not be over-stressed. It would be quite unfortunate for word to get out into the community prior to your being ready for public announcement. Should this happen you will find the "anti-choice" forces quickly at work to create an environment that would make it most difficult—if not impossible—to function and to enlist financial and other support.

These forces will move quickly to "identify" your contemplated program as the antithesis of educational reform before it is even off the ground. Should this happen the "first strike advantage"—and hence the opportunity to set and maintain your own agenda—would be gone forever. Therefore the message is this: Protect your program and your efforts by maintaining a very high level of confidentiality and identify and release your program only in such a way and at such a time as is to your advantage.

The research that is required to allow an accurate identification and evaluation of local issues can be divided into two areas: the private school sector and the public school sector.

PRIVATE SCHOOL SURVEY

In most communities across the United States exercising educational choice means attending a nonpublic school. Such private schools charge tuition and hence the voucher system is used to provide financial assistance for low-income families in hopes of providing them this educational opportunity.

But a number of very key questions must be answered long before any announcement can be planned. These key questions include:

1. How many non-public schools are there and what is their total enrollment?

2. What kind of schools are they?

3. What grade levels do they offer?

4. What is their current enrollment and how many seats do they have open?

5. What is their drop-out rate?

6. What is there tuition charge policy?

7. Do they participate in the Federal School Lunch Program and, if they do, how many students are enrolled?

The answers to each of these questions are absolutely critical for many reasons. Not the least of which is that they will tell you whether or not the school community has the capacity to successfully respond to a privately funded choice program. No small piece of critical information! Secondly the answers to these questions will be required by any potential funding source. And finally these answers are a must to the requisite financial analysis that will be required when designing the actual program components as more fully discussed in Section Four.

Earlier the importance of secrecy was stressed. Here is stressed the importance of a survey to gather information on private schools. How can the latter be accomplished without compromising the former? The answer is quite simple. First there is no way getting around doing a survey in some form or fashion. (The method is not as important as the results.) APPENDIX 5 offers survey samples utilized by the CEO Foundation of San Antonio. Notice that the name on the survey form is not that of the CEOF. This one page survey was composed to gather all of the pertinent and required basic information and it was done under the name of a sponsoring foundation.

This survey should be done very early on in the organizational process. The information that will be gathered here will form all other key aspects of design - not the least of which will be the student dollar limits and capacities of the program.

Data gathering on private schools must not be limited to a written survey only. There is no substitute for doing personal research to answer the following:

1. What is a particular school's reputation in the community (as to academics or otherwise)?

2. Is it accredited?

3. Does it teach principles and values that your program and its sponsors are willing to support?

4. What is known about the people running the school?

5. What is the economic profile of the families served by each school?

6. What is the ethnic profile of the families served by each school?

It is also important to learn what unique educational initiatives any of these schools have tried (or is trying). What is the nature of the initiative? Do they have private sector partners? If so, who are they (potential donors!)? How much private money was invested? Does there exist any partnering with the public school segment? If so, what is the program design/intent?

All of the above are important questions if your program is going to be paying money to these institutions. It is therefore necessary that as much is known about these schools as possible.*

PUBLIC SCHOOL SURVEY

A survey of the public schools in the target area is also critical, but once again the author wishes to stress the very important aspect of project secrecy. The basic questions to be answered for the public schools are:

1. What public schools (or public school districts) take inter- or intra-district student transfers as a matter of policy and, if they do, for what tuition charge?

2. What is the position of the public school district(s) on educational choice?

These questions do not require a formal written survey. Rather an afternoon of phoning and personal research would suffice in gathering this important information. As in the private school research it is also important to learn what unique educational initiatives the public school districts have tried (or is trying). This is especially applicable as to any educational choice experiments. What is the nature of the initiative? Do they have private sector or media partners? If so, who are they (potential donors or partners!)? How much private money or in-kind value was invested?

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*Remember that as a matter of accountability and stewardship, there will be a great responsibility placed on a new program to know exactly who will be receiving scholarship funds.

Other important research questions should be: Does there exist any partnering with the private school segment? If so, what is the program design/intent? Are there any educational reform movements at work? If so, who is behind it and who funds it? Are there any established relationships between the public schools and local universities?....Think tanks?....Education foundations? Particular state legislators?

Other critical questions to ask are:

1. Which public school district (if more than one in the target area) is generally considered to be the most progressive?

2. Which public school district (if more that one in the target area) is generally considered to be the most entrenched?

3. Is any one of the public school districts considered a de facto leader among its peers?

4. Is any major corporate citizen tied into any one district? If so how.

The answers to these questions make for important ingredients into a program's design....a design which must respond to the environment within which the program can successfully function.

SITUATIONAL ANALYSIS

After the research of the private and public schools is complete a full picture of the educational environment of the target area can be compiled. A strategic analysis is imperative and every effort must be made to learn everything possible from the data collected. Although there is no substitute for one's own imagination and initiative, some of the key questions to be asked are:

1. What is the total current private school market and what is its capacity in terms of numbers of students?

2. What "partnership" opportunities might exist:

   - Public school districts?
   - Corporations?
   - Locally based think tanks?
   - Local colleges or universities?
   - State legislators?
   - Interested individuals?

3. Who are the educational "players" in the community?

4. How much opposition can be expected to an educational choice initiative:

    - From the public?
    - From the media?
    - From the educational community?
    - From other educational initiatives?

5. How can that opposition be neutralized by the program design?

6. Who would be likely supporters of an educational choice initiative?

7. What schools will stand to gain the most from the program?

8. What is the average tuition rate of all "eligible" non-public schools? (See NOTE at the end of this section for a comment on "eligible" schools.)

9. If applicable, what is the average tuition rate of the public schools which accept inter- or intra-district transfers?

10. How large a cash fund will be required to reach a goal of helping "X" number of students? (Based on questions 8 and 9)

11. What percentage of current private school students receive assistance from the Federal School Lunch Program?

Several of these questions deserve additional comment. It is vitally important to understand the potential sources of praise and of criticism. It is also important to understand what schools would stand to gain the most from a program in your community. Why are these pieces of information so important? For the following reasons:

1. A source of criticism should be carefully studied and not taken lightly. Sources of criticism are important to funding sources and therefore important to a potential program's success chances (if it's important to them, it's got to be important to you!).

2. Doing a good job of anticipating the sources and content of criticism should figure greatly into how a program's focus is formulated, how it is designed and how it is announced. If done correctly much preventive work can be programmatically built in.

3. Knowing who stands the most to gain is important, too. Generally speaking it is not considered to be beneficial to the program if it is aligned too closely with any group, organization or religious denomination, for this also would hurt the program's independence (referring to the group who may stand to gain the most). Hopes for effectuating systemic change must be found in a program which is not aligned with any special interest group if this is to be a truly credible reform movement.

The answers to these questions will comprise the cornerstone issues determining the particular features of a privately funded educational choice program in any given community. How this research directly affects a program design is dealt with in the following section. Also from this critical analysis a list of potential anchor donors must be identified and developed which is discussed more fully in Section Five.

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NOTE:
The definition of an "eligible" school may prove to be significant once the program is announced. Generally speaking the major question is "Are public schools eligible?". There is however an ongoing debate over whether or not a program could (or should) exclude certain types of school such as expensive boarding, military or specialty schools. Of the four existing programs only Milwaukee has an expressed definition of "eligible". They require that schools maintain standards of excellence, non-discriminatory policies, a commitment to a values-based curriculum, the education of children from culturally diverse backgrounds, a commitment to involving parents as the primary educators of their children, and sound governance and fiscal management.

SECTION FOUR

DESIGNING THE PROGRAM

Now that the necessary research, data gathering and identification of local critical issues has taken place a preliminary program design can be effectively undertaken. At this point it can only be considered preliminary because the program will undergo normal developmental changes as various donors and potential donors begin offering their input.

Once again the program organizers are cautioned to maintain the secrecy of their project during the entire developmental stage.

This section is divided into three parts: Programmatic Issues, Administration Issues, and Empowering Documents. The order of presentation is quite intentional as it parallels the sequence in which these issues must be approached and defined.

PROGRAMMATIC ISSUES

Anyone with a serious interest in replicating a privately funded educational choice program should begin with a careful review of the documents from the four existing programs (APPENDICES 1-4). Also of considerable help should be Section Two of this prototype document with its concluding comparative matrix.

After carefully reviewing the local critical issues, and the data assembled on the private and public school environments, the definitive organizational work for a new program can begin.

The first step in this process is to re-visit the focus statement developed in Section One. Does it still apply? Can it be expressed more clearly? Does it fit the local situation/needs? Is it "adoptable" by potential donors and supporters? What will be the public perception of that statement? All are vital questions which should be carefully considered at this important juncture. All things must flow from this statement.

In the first part of Section One there was presented the seven basic common denominators of the four existing programs. For purposes of this prototype model these seven basic characteristics will be assumed. The question that therefore follows is: "What special characteristics will make up our program?"

While this section offers a wide menu of questions to consider in response to that question the reader is cautioned to use these only as a guide. They are in no way meant to be all inclusive of the important facts and nuances of every local situation. Consider them only a program recipe to which changes are required in order to meet local needs.

Local Replication Questions

Each of the following questions deals with those particular issues which must be evaluated on a localized basis. Each one greatly impacts the success opportunity of a new program and should therefore be carefully considered. To assist the reader in this consideration a brief comment is offered on many of the key questions that follow.

1. What total annaul dollar commitment will be made to fund the program?

2. For what minimum number of years will the annual dollar commitment be made? It is strongly recommended that an initial commitment be made for a minimum of three years.

3. What dollar limit per student will be set? This dollar limit is usually set by taking half of the average annual tuition of all the "eligible" schools. This number, divided into the total amount of the initial scholarship fund, will give the minimum number of students targeted for assistance.

4. Will the amount of each scholarship award be a fixed amount for the three year period or will the amount increase as tuition increases over the course of time? To do the latter creates some very difficult budgeting challenges in that funds would have to be kept in reserve in year one for tuition increases in years two and three. If on the other hand the amount awarded is fixed for the three years, this uncertainty is eliminated and no funds will be required to be reserved - meaning more scholarships can be issued upfront.

5. To what extent will the program be made available to students currently in private school? In public schools? Typically this ratio is maintained at 50-50 for many reasons not the least of which is to make it a bonafide choice program which neither favors nor deters any one group (such as favoring religious schools or penalizing families already exercising choice). A new program's stated policy on this question is also a key factor in responding to a critic's question: "Isn't this a program designed to criticize or destroy the public education system?" or the frequently heard, "Isn't this just to help Catholic (or certain other) schools?".

6. What will be the geographic boundaries of the program?

7. What will be the grade level parameters for participation (upper and lower)? And what happens when, if a three year commitment is made to a student, that student exceeds the upper grade limit? An example of this would be if the upper limit were eighth grade and an eighth grader entered the program under a three year commitment. A common solution is that a program would stay with that student for grades nine and ten if (s)he wished to continue exercising CHOICE, under the original terms, conditions and limitations.

8. How and by whom will the over-all program be evaluated? How will the students' improvement be measured, including academic and non-academic progress? Also of vital importance is the ability to compare different programs' evaluations with each other (currently three of the four existing programs have coordinated their evaluation efforts so their respective results can be legitimately compared). These issues are of great importance if this movement is to effectuate systemic change in the national educational system. (See Section Eleven for more on this.)

9. What will the policy be for siblings, i.e. will they be given preference in the last served first served process?

10. Is your local situation such that an Advisory Board should be formed (either for reasons of public acceptability or for fund raising)?

11. What will be the role of the Board of Directors? Who will sit on the Board?

12. Will donors be allowed to make "designated" contributions? This is a touchy topic under IRS rules and should be carefully analyzed. The general thought is that this might be fine if the "designation" was a particular school or grade level as opposed to a particular student.

13. How will the applications be distributed? Since the program design - by necessity - is first come first served it highlights the importance of an application

distribution system that provides "equal access" to everyone. This distribution decision will prove to be a critical one to a program's credibility. (See Section Ten for more on this.)

14. Finally, there is the VERY CRITICAL question of whether or not to include public schools in the program. The strong recommendation of this model, for many reasons, is YES. An illustration of the power of this point is San Antonio who does include public schools as eligible participants in the program. San Antonio has several public schools who would accept out-of-district children for a tuition charge. (Few families applied to the CEO Foundation to attend these schools!) Additionally the inclusion of public schools further illustrates a real commitment to parental CHOICE and clearly gives a message to all that the program's purpose is neither to destroy public education nor to promote private or religious education.

While other issues may be identified in the course of the research, the considerations outlined above constitute the specific local programmatic issues for which specific decisions must be made.

In addition to these programmatic questions, one other significant local replication issue should be addressed at this time. This is the decision regarding whether or not to utilize the services of a advertising/public relations or imaging firm. Of the four current programs two have hired a firm to assist in various matters ranging from media training, media coordination, writing, ID development (logo, letterhead, etc.), donor solicitations/introductions, press clippings/video tape collection, promotion activities, etc.

The influence of a strong local advertising firm can not be overlooked as they will represent advertising buyers with the very same media outlets that will be writing about your choice program. This constitutes great potential leverage on your part! Besides making the media outlets automatically more "friendly" to a choice initiative involving a large media buyer, it also opens the doors to the corporate clients on whose behalf the PR firm places advertising. These corporations could be potential donors. The question of hiring a firm is a wonderful example of an alliance which comes from strategic thinking in the early development of a local program.

ADMINISTRATION ISSUES

No less a part of the overall design is the administrative function of the program. It must be said that if a magnificent job is done in every other area, but the administration is deficient, the program will suffer from a terminal lack of credibility. Neither the organizers, the donors, nor the national CHOICE movement can afford for this to occur. The secret to the successful administration of a

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***Section seven of this model deals with the subject of PR/Advertising Firms in more depth.**

rogram lies in thoughtfully performing all of the critical steps discussed in this model up to this point. This provides the very basis upon which the operational aspects must function. Hence the stronger the foundation the stronger the entire structure.

The first administrative step must be to identify the person who can be the organizationalist in this effort. This should be a person of experience and considerable local knowledge. It would be this person's responsibility to orchestrate, in secrecy, all of the required up-front research, know how to strategically interpret the results and, in conjunction with the anchor donor, arrive at the critical decisions at the proper times. The importance of this role in the formative stages of a program is absolutely critical.

As the program is developed and each milestone decision is made with donor commitments collected along the way (section five), thoughts must then turn from developmental concepts to operational duties. The basic operational tasks of managing an educational choice program are relatively simple but critical. The real difficulty lies not in the routine task but in the vast array of questions and circumstances that arise in working with parents, schools, donors, potential donors, the public, the media, etc. Much is at stake as far as the program's relationship with these important people. There can be no chance of failure.... especially failure due to administrative weakness.

Many qualities and talents are needed to administrate a program. Since every locale's requirements will be different this model does not offer an established profile other than to say the person must have strong interpersonal and organizational skills.

One last word about the general aspects of the administration before looking at the actual tasks themselves: How do you pay for it? It seems that the best course identified to date is the one established by Patrick Rooney of Indianapolis by saying that the amount of scholarship monies donated were to be used 100% for that purpose. Meaning that "scholarship" money is just that...not to be used for administration expenses. The important points here are first public perception and second, donor comfort. It is important that there be no appearance of an administrative bureaucracy. This certainly makes the difficult task of fund raising just a little easier.

The Tasks

As previously mentioned, the job of the administrator demands a higher than normal level of organizational skill. (A sample of an administrator's job description is offered in APPENDIX 6 of this report.) This skill begins with the initial survey prior to public announcement and extends to working directly with the parents and schools and disbursing the funds. The spectrum of tasks to be performed is great.

The major administrative tasks that any new program will have to deal with, and which are so important to the overall credibility of the movement are:

1. The initial survey of schools (pre-announcement);

2. Preparation of all necessary forms and documents;

3. Defining all procedures and policies to be used in the application and related subsequent processes;

4. Enforcing the procedures and policies above;

5. Defining the data processing requirements of the program including the considerable initila data entry demands;

6. Establishing and maintaining the integrity of the program data;

7. Identifying the resources needed to successfully carry out the intent of the program;

8. Keeping the program sponsors involved and informed;

9. Designing and maintaining an adequate system of accounting for applications received and their corresponding dollar value; and,

10. Maintaining direct lines of communication with each school to work out the ever-present questions and "special cases".

Each local program will be somewhat different and indeed in some cases the tasks outlined above may be spread out over several people. It is critical however that one person be held responsible for all of these important tasks. At the risk of being repetitious the author wishes to once again stress the importance of a credible operation.

Before closing this general discussion on administrative tasks a few words on item number three above are in order. This area is probably the single biggest source of concern in a CHOICE program. The critical issues here are:

A. The manner in which applications are distributed;

B. The manner in which applications are received from the applicants; and,

C. The manner in which the integrity of the first come first served system is maintained.

The experience of the four existing programs says these are the areas that offer the most problems, the most potential for negative exposure, and often times the most confusion.

EMPOWERING DOCUMENTS

APPENDIX 7 contains the basic empowering documents consisting of:

Articles of Incorporation
By-Laws
IRS Application for Recognition of Exemption
Form 1023 (501(c)(3) application)

Every state's requirements will be somewhat different as to the first two items, therefore a potential program is encouraged to consult with legal counsel on these. The IRS form 1023 should be basically the same for any program, barring any significant programmatic or organizational differences.

Prior to completing the Articles of Incorporation and By-Laws it is advisable to analyze carefully your intent for the board of directors. The critical questions to ask are:

1. What will be the main purpose of the board? Honorary? Working? True policy making board? Fund raising only?

2. Depending on the expressed purpose of the board, what talents do you need to have? Legal? Financial? Business? Community?

3. Should the board have grass-roots representation? If so, to what extent and specifically for what purpose?

These questions are key to the drafting of the empowering documents and therefore have to be adequately addressed prior to their completion. If the board is other than a small hand-picked group, it will be important to carefully identify the terms of office and the mechanism by which the board members are elected and removed, the process of calling meetings, changing By-Laws, etc.

SECTION FIVE

RECRUITING YOUR PARTNERS

Having followed the steps previously outlined, a new program should now have quite a few ideas as to potential financial partners. If this model has done the job it is intended to do it has helped raise the right questions and identify the critical issues that present the strategic information needed to determine the possible players in a CHOICE experiment.

The goal of this section is to help bring together all of the information gathered to date into a usable array for recruiting financial partners. The critical questions are:

1. What corporations or individuals are the "education players" in the community? This is a crucial question of some complexity in that it should not be assumed that a current "player" will want anything to do with a CHOICE program. In fact some may be quite upset with your CHOICE efforts. This may also be a difficult political situation to evaluate. Remember: Some will love you and some may very well hate you for what you are about to do. The reader is reminded that the program's stated focus and design become very critical issues to potential partners.

2. What partnership initiatives have the public schools tried and who were their cohorts?

3. What local think tanks, policy groups, foundations or trusts have a history of supporting new and innovative educational programs? These people can be very key not just in scholarship monies, but also for in-kind support such as administrative support.

4. What educational ventures have the local media participated in? Is there an educational leader among them? Special note might be taken of San Antonio, who has a media partner, as an example of the dramatic benefits which can be realized when it comes to communicating the program's message.

5. What special interest constituencies are there in the community? Is approaching any of these groups as a potential partner an advantage or disadvantage to the program?

6. Who in the local community are the ten largest payors of public school taxes? This might be a very interesting group to identify as potential funders.

Studying the above questions should result in the development of a list of potential donors, as well as perhaps a list of people not to approach for whatever reasons. Added to the list of potentials should be the names of those persons or institutions that would be considered the community's known or traditional players. Also added to the list for serious consideration should be those persons or institutions who are positioned to provide the new program with something it will need other than cash (in-kind contributions). An example of this is to approach a computer store for a donation of hardware or software with which to operate the new program. Another category of potential donor is one that might make a cash or in-kind donation and who clearly has something to gain from it.

A perfect example of this is to approach a newspaper to be a "founding partner". The previously mentioned San Antonio experience is an excellent example. Their program was configured in such a way with a newspaper partner that it has proven to sell a lot of newspapers. And the fact that a media outlet is "in the deal" certainly doesn't hurt!

Once this "long list" of potential donors is complete a strategic evaluation of each must be made. From this should come a determination of the likelihood of their individual interest and therefore a decision as to which to approach (short list). It goes without saying that each potential partner must be an asset to the program being mindful that the collective partners must constitute a good working team. Each partner must contribute their own unique talent and resources toward a totally successful effort.

Once the "short list" of potential donors is developed and refined all of the usual fund raising precepts apply, i.e. know donor's likes and dislikes; know donor's giving history; know whose opinion the donor respects; identify what "connectors" you may have to the potential donor; identify common denominators, etc.

Finally there is the matter of identifying that special "anchor donor". As can be expected this is somewhat more difficult in that this would likely be the first and largest check to be written. The anchor commitment would hopefully be of a size that subsequent potential donors are truly challenged to follow such a significant example.

How is this person identified? The author, in collaboration with others, has carefully considered this question in hopes of developing an anchor donor profile. What follows has been based upon a collection of actual experience. Only history will prove its accuracy.

ANCHOR DONOR PROFILE:

Is there an individual in the community who fits the following profile:

A. A person of financial capabilities (either directly or through a corporation, trust or foundation);

B. A person considered to be a bit of a maverick in terms of the traditional "establishment";

C. A person known for a strong belief in values, ethics and justice;

D. A person convinced of the need to reform the public education system; and finally,

E. A person of strong faith and ideals.

This profile describes the best possible candidate for the position of anchor donor. Perhaps there is someone in your community who fits all or some of these traits.

The recommendation of this model is that an initial team of "founding partners" be assembled, the announcement made, then other potential donors approached. Identifying and recruiting donors for such a unique and sometimes controversial idea as a privately funded school CHOICE program requires a unique level of strategic team building. It is not just a matter of approaching people and asking for money. Much thought, research and preparation will pay off in many ways.

Finally the author wishes to add a word as to the type of talent it takes to pull together the strategic dynamics of the initial donor team. The ideal candidate for such a job is a person who is well versed in the community, knows the private and corporate citizenry, has a level of credibility that donors know and trust, and who understands the critical dynamics it takes to build an effective team.

SECTION SIX

DATA PROCESSING

No small consideration from an operational standpoint is the handling of the great amount of data by computer. If history is any gauge this aspect is among the easiest to underestimate!

Of the four existing CHOICE programs as of this writing, all utilize a personal computer with some type of data base software. Indianapolis uses Alpha 4* software and Milwaukee uses Excel*. Two programs, Atlanta and San Antonio, use Paradox* with the latter also using Quicken* for voucher disbursements.

No matter what the software the function is the same—managing data and being able to access it in many differing ways. Any good data base software running on a compatible computer of reasonable speed and capacity should be sufficient.

The critical issue in this area is having a system already configured and ready to go before you begin taking applications. Utilizing the power of the computer is the only reasonable way to handle the great flood of information when hundreds of applications begin to arrive. And as those scores of applications pour in there will be many calls from donors and the media wanting the most up-to-date information....and it must be available.

Among the common questions a new program can expect are:

- How many applications have been received?
- How many different schools have been applied to?
- How many minority children have applied?
- What is the dollar total of scholarships applied for?
- What is the break down of students and dollars as to how many families previously exercised educational CHOICE vs. how many are exercising CHOICE for the first time?
- What is the grade breakdown of the student applicants?
- What "type" of schools are the children applying to?

These may sound like very simple questions, and in fact they are. However in the midst of the high level of activity and public attention that can be expected the answers to these questions can become very major issues. The voice of experience advises that it is no easy task.

Once a data base system is chosen there is the all important question of how to identify the various fields of needed information. To assist in this determination a sample of a student's record layout is illustrated in **APPENDIX 8**. The reader will note that most pertinent pieces of information appear somewhere in the layout. Some information will originate with the parent's application and some from the school's application. Naturally the format is not nearly as important as the capturing of the data itself.

The record layout shown in **APPENDIX 8** does not reflect two very critical pieces of information that must be included: Ethnicity and the affiliation of the school (i.e. public, Lutheran, Baptist, Catholic, etc.). As a new program moves through its hectic post-announcement stage one can expect many questions in these two areas. The data base system must be designed to quickly give you this information.

To give the reader an example of the type of reports that will prove helpful to a new program **APPENDIX 8** also includes two statistical reports developed by Patsy O'Neill, Executive Director of the CEO Foundation. Information such as this must be considered absolutely necessary to the development and reporting process and it should be widely used with the program donors, the public, the schools and the media.

The final part of **APPENDIX 8** illustrates a sample page from the student report which, in this case, is in student alpha sequence within school sequence. Notice that the student number appears on the report as it constitutes the system identifier for each child. This all important number is more fully discussed in Section Ten.

If a new CHOICE program wishes to utilize the same software and specific design components as the CEO Foundation, they may purchase the Paradox and Quicken programs from their local software dealer or they may contact the San Antonio program directly. The specific customized design components developed by John O'Neill for the CEO Foundation, and used in conjunction with these software packages, will also be made available on diskettes at no charge by contacting the CEO Foundation. In addition, a complete step by step guide to the tables, reports, forms and scripts will be provided thereby greatly reducing the administrative time required to establish and manage a new program.

*** All trademarks and copyrights are fully acknowledged.**

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NOTE:
None of the application forms of the current programs have asked for ethnic identification or school affiliation. This information can either be incorporated into the basic application form or gathered at a later date (subsequent to enrollment) through survey or other means.

SECTION SEVEN

Imaging and Media Requirements

Of the four existing programs only two, San Antonio and Milwaukee, utilized a public relations or media firm. While local situations, personal preferences and budget will help a new program decide what is in their own best interest this model strongly recommends that an advertising/public relations firm be engaged. If the right firm is chosen they can bring a level of credibility to a new program that will be invaluable. In terms of the impact on current donors, potential donors, public acceptance of the program, levels of criticism, and most importantly—message control.

An outside firm can provide many differing services. To help a new program consider what services to request a reproduction of a Request for Proposal for an advertising firm is included in APPENDIX 9. (It must be pointed out that after the announcement of the program—and in the midst of so much positive public attention - the firm hired by San Antonio became so supportive that they voluntarily expanded their scope of work and performed far beyond the $5,000 fee they were paid. In return the CEO Foundation publicly acknowledges the firm as a contributor.)

At the beginning of this section reference was made to "....if the right firm is chosen....". This is a very important concept and one which fits in well with the discussion in Section Five regarding strategic team building. The concept is this: A good advertising/PR firm will have many key corporate relationships. The firm will also know the likes and dislikes of these corporations and are in a unique position to "recommend" to them items of community service and involvement from a PR standpoint. This can be become a major door-opener for a new program.

Another dimension to this concept is that....if the right firm is chosen.... they will have a considerable amount of clout with the media because they themselves are in a position to buy advertising time/space (on behalf of others). This gives the members of the media something to think about in that they will want to keep a major media buyer and their advertising clients happy. Those clients might very well become funders of your program!

In the case of San Antonio the PR firm which was hired took the lead in using their media relationships by to invite all TV and radio general managers to a luncheon, sponsored by the newspaper partner, to hear about the new program several days prior to the public announcement (under the agreement of embargo). While there is no way of knowing for sure, the consensus in San Antonio is that this was a major factor contributing to the total absence of negative press.

Other advantages of utilizing an advertising/PR firm are:

1. Logo and identification/image development;

2. Fast and professional response to media opportunities;

3. Producing and orchestrating press conferences;
4. Coordination and promotion of talk show appearances;
5. Identifing opportunities for advance publicity;
6. Assembling of media kits; and,
7. Gathering of all media coverage (video tapes of TV news, newspaper/magazine articles, etc.).

SECTION EIGHT

Flow Chart and Sample Timeline

There are many steps to undertake in establishing a privately funded CHOICE program as presented in this model. Not only is it important to identify each of these specific steps but so too is it important to recognize the proper sequence of their occurrence. A new program need not feel overwhelmed by these issues.

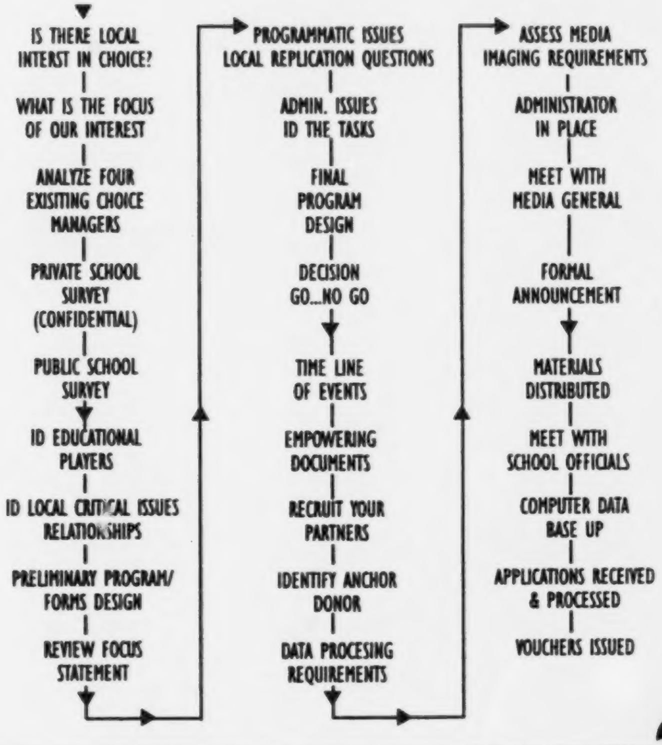
The purpose of this section is to give the reader:

1. A sequential overview of the specific organizational and operational steps required in establishing a program; And,
2. An idea of the time elements which might be associated with each.

FLOW CHART

The following diagram illustrates a flow chart or "road map" of the specific events which must occur in the organizational process. It is presented in a form such that the sequence can be more readily understood and it includes the major decision points which occur along the way. While every program will be somewhat different, it is important that each consider the very basic and specific steps outlined herein.

FLOW CHART OF PROTOTYPE STEPS


IS THERE LOCAL INTEREST IN CHOICE?
WHAT IS THE FOCUS OF OUR INTEREST
ANALYZE FOUR EXISITING CHOICE MANAGERS
PRIVATE SCHOOL SURVEY (CONFIDENTIAL)
PUBLIC SCHOOL SURVEY
ID EDUCATIONAL PLAYERS
ID LOCAL CRITICAL ISSUES RELATIONSHIPS
PRELIMINARY PROGRAM/ FORMS DESIGN
REVIEW FOCUS STATEMENT
PROGRAMMATIC ISSUES LOCAL REPLICATION QUESTIONS
ADMIN. ISSUES ID THE TASKS
FINAL PROGRAM DESIGN
DECISION GO...NO GO
TIME LINE OF EVENTS
EMPOWERING DOCUMENTS
RECRUIT YOUR PARTNERS
IDENTIFY ANCHOR DONOR
DATA PROCESING REQUIREMENTS
ASSESS MEDIA IMAGING REQUIREMENTS
ADMINISTRATOR IN PLACE
MEET WITH MEDIA GENERAL
FORMAL ANNOUNCEMENT
MATERIALS DISTRIBUTED
MEET WITH SCHOOL OFFICIALS
COMPUTER DATA BASE UP
APPLICATIONS RECEIVED & PROCESSED
VOUCHERS ISSUED

TIME LINE

The question is often asked "How long does it take to organize a private CHOICE program?". The answer is of course dependant on many factors and therefore different for every locale. A sample of a time line document illustrating the major events and the time associated thereto appears next.

Children's Educational Opportunity Foundation
Organizational & Implementation Timeline-Overview

		1992											
	DEC	**JAN**	**FEB**	**MAR**	**APR**	**MAY**	**JUN**	**JLY**	**AUG**	**SEP**	**OCT**	**NOV**	**DEC**
INITIAL DISCUSS./DESIGN	xxxxx												
CHARTER/BY LAWS DRAFTED	xx												
ORGANIZATIONAL METHODOLOGY	xxxx												
FINAL PROGRAM DESIGN		x											
DECISION: GO—NO-GO		x											
CHARTER FILING		x											
SS-4 FILING		x											
IRS FORM 1023 FILING		xxxx											
MARKETING/IMAGE DESIGN		xxx											
MATERIAL DESIGNED/PRINTED			xxx										
ADMINISTRATION IN-PLACE			xxx										
FORMAL ANNOUNCEMENT				x									
MARKETING/IMAGE PLAN IMPLEMENTED			xxx										
MATERIALS DISTRIBUTED				xxx									
MEET WITH PRIVATE SCHOOL OFFICIALS				x									
APPLICATIONS RECEIVED, PROCESSED				xxxxxxxxx									
COMPUTER DATA BASE SET UP				xxxxxxxxxxxxxxxxxxxxxxxx									
COMMITMENTS ISSUED TO SCHOOLS					xx								
SCHOOL CERTIFICATIONS RECEIVED									xx				
VOUCHER FUNDS DISBURSED										x	x	x	x

Just as it is important to a new program's organizational development to establish time lines, so too is it important to have specific task assignments. For illustrative purposes a copy of the CEO Foundation's Objectives-Time Line-Assignments follows.

CHILDREN'S EDUCATIONAL OPPORTUNITY TRUST
OBJECTIVES - TIME LINE - ASSIGNMENTS
March 3, 1992

COMPLETION DATE	OBJECTIVE	PERSON RESPONSIBLE
JANUARY 23	STATUS MEETING	FRITZ ROBERT
JANUARY 24	SECOND DRAFT OF APPLICATION	ROBERT ROBIN
JANUARY 24	ARTICULATION OF "WHY"	FRITZ
JANUARY 28	BOARD DEVELOPMENT GOALS	ROBERT FRITZ
JANUARY 31	FINAL LISTING OF SCHOOLS/PRINCIPALS	ROBIN FRITZ
JANUARY 31	LOGO FINALIZED	FRITZ
FEBRUARY 3	CHARTER FINALIZED AND FILED	TIM ROBERT
FEBRUARY 3	SS-4 FILED	TIM
FEBRUARY 4	ADMINISTRATOR HIRED	FRITZ
FEBRUARY 7	PUBLIC RELATIONS/IMAGE FIRMS INTERVIEWED	FRITZ ROBERT
FEBRUARY 10	BY-LAWS FINALIZED	TIM ROBERT FRITZ
FEBRUARY 14	PUBLIC RELATIONS/IMAGE FIRM HIRED	FRITZ ROBERT
FEBRUARY 14	TUITION/ENROLLMENT DATA ON SCHOOLS	ADMINISTRATOR TPPF STAFF
FEBRUARY 17	PHYSICAL COMPONENTS IN PLACE (OFFICE, PHONE, FURNITURE, COMPUTER, ETC.)	ADMINISTRATOR FRITZ
FEBRUARY 18	IRS 1023 FILED	TIM FRITZ
FEBRUARY 21	APPLICATION FORMS FINALIZED	ROBERT

FEBRUARY 21	PROGRAM PROJECTIONS/CALCULATIONS/ GRANT LIMITS	ROBERT
FEBRUARY 21	USAA'S INVOLVEMENT DETERMINED/STRUCTURED	JIM FRITZ ROBERT
FEBRUARY 25	MAJOR PROGRAM COMPONENTS FINALIZED	ROBERT
FEBRUARY 28	STUDENT DATA BASE DESIGNED	ROBERT
MARCH 3	LOGO FINALIZED	JIM FRITZ ROBERT
MARCH 3	POTENTIAL BOARD MEMBERS APPROACHED	JIM FRITZ ROBERT
MARCH 6	PUBLIC RELATIONS/IMAGE PROGRAM DESIGNED	FIRM ROBERT FRITZ
MARCH 6	DATA BASE FILE IDENTIFIED	ROBERT
MARCH 10	FORMS FINALIZED	ROBERT
MARCH 18	PREPARATION OF PRESS RELEASE/PACKETS	ANDERSON BARBARA
MARCH 20	DR. MOORE'S INVOLVEMENT DEFINED	FRITZ
MARCH 20	BOARD MEMBERS IN PLACE	FRITZ
MARCH 20	TESTING ISSUE RESOLVED	BARBARA
MARCH 20	SCHOOL MAIL-OUT PACKETS FINALIZED	BARBARA ROBERT
MARCH 20	STUDENT DATA BASE SET UP	FRITZ
MARCH 21	MAIL-OUT PACKETS SENT	BARBARA
MARCH 24	MEETING WITH MEDIA MANAGERS	ANDERSON
MARCH 25	PRESS CONFERENCE - ANNOUNCEMENT	ALL
MARCH 28	MEETING WITH PRIVATE SCHOOL OFFICIALS	ROBERT BARBARA

SECTION NINE

THE ANNOUNCEMENT AND THE AFTERMATH

Among the biggest problems experienced by each of the four existing CHOICE programs was how to cope with the huge response generated subsequent to the announcement of their program. All agree that they were not prepared for the volume of response and the amount of immediate following that was necessary. It could be said that if getting to the point of the public announcement was difficult, the aftermath was impossible!

The purpose of this section is to give the reader a "heads up" on what to expect once the new program is announced.

First it is strongly recommended that some one be designated as the program's spokesperson. In the wake of the announcement and all of the resulting hype and confusion, this becomes a very important aspect of controlling your message. This also helps greatly with image establishment - especially in the first critical weeks.

Second, as discussed earlier, one can expect to be deluged with inquiries from the media as to facts and figures as the new program begins what will be a rapid growth. This may sound like a simple task of minimal difficulty. The experience of others says it is not. While the media attention will "demand" much of the program's attention, so too will there be hundreds and (hopefully) thousands of parents wanting information.

Through all of the above it is imperative that the program maintain the highest level of credibility. Credibility with the parents, the schools, the public, the media and the program funders. With respect to the latter it must be remembered that every precaution must be taken not to cause these donors any embarrassment brought about by a log-jammed or compromised administrative system. This is therefore no small consideration to those in a position of responsibility.

Critical to the long term administrative aspects of the new program are the procedures identified in connection with the handling of the "first come first served" applications. The mechanics of the numbering (receipting) of each application and its immediate entry into the data base system will prove to be most critical. Therefore a new program is cautioned to plan carefully its operating procedures making sure that all involved are knowledgeable as to the policy.

Some key questions concerning the announcement need to be addressed. These are:

1. What key persons/groups should be told of the new program prior to announcement? (For political or other reasons, these could be politicians, media executives, public or private school administrators, potential funders, key civic leaders, etc.)

2. What will be the forum or setting for the announcement?

3. Who should be invited to attend the announcement (this is a very tactical question!)?

Naturally the approaching of the date of the announcement presupposes that all procedural, financial, administrative, and imaging work has been adequately performed.

The press releases issued by each of the four existing programs appear in APPENDIX 10. Also included therein is a sample of letters sent to both the public and private schools announcing the program.

SECTION TEN

OPERATIONAL TIPS

Conceptually the privately funded CHOICE concept is uniquely simple. But like many simple concepts the reality of its execution can sometimes be difficult. In many ways this holds true in this case.

The purpose of this section is to highlight certain areas of potential difficulty as experienced by other programs. While the concept is simple it is wrought with many nuances which, if not properly planned for, can cause a new program some tense, and often embarrassing, experiences. These comments are therefore offered in hopes they will assist in identifying these critical areas in the journey that lies ahead.

THE APPLICATION PROCESS

A decision needs to be made as to the process which a parent must undertake to apply. The question is "Should an applicant complete the form and send it to the program office, OR do they send it to the school of their choice?" The difference between the two options is huge. To maintain the basic tenet of equal opportunity, and to maintain a process that is within the control of the parent, this model purports that the best answer is that the parent should send the application directly to the program office. If the application were to go through the school, the child's fate ends up in the hands of the school and their ability and disposition to respond in a timely manner. The author believes this is unfair to both the family and the school. The best way to make it a "first come, first served" process is to keep the parents in control of their destiny. [NOTE: If the parent sends their application directly to the program office as recommended here, this will mean that the School Application must be a separate form. For further information on this please refer to the section below entitled DESIGNING THE APPLICATION.

A second and no less important question is: "How will the applications be made available to the targeted public?". Once again equal opportunity/access is the key. Various programs have used differing distribution means from public libraries, to private schools, to the mail to general circulation newspapers. This model takes the position that, by far, the best and most "equal" method of application distribution is through the newspaper. While this does not preclude other distribution methods, it is the only indisputably "equal" method available. This avenue gives the broadest group of people the quickest access at the very same point in time.

Another major decision concerning this process is how a new program receives the application. This is much more complicated than it sounds. The question is "Should a new program receive applications by mail, in person, or both?". The importance of the first come, first served tenet is absolutely crucial as highlighted above. Just as there must be equal access to the application forms themselves, so too must there be equal opportunity to submit them. A new program must carefully consider whether accepting applications in person in effect favors families who have transportation or who have the ability to take time off from work, versus those who have neither. The program is, after all, for the latter group most of all. Remember that equal access does not mean equal access to the forms, it means equal access to the funds.

Also critical to the integrity of a new program is the manner in which "first come, first served" is determined. Once again this is a simple concept with not so simple implications. No other aspect has more potential for criticism and grief than this one. Prior to the announcement of a new program the administration must be in place and ready for the onslaught of applications. Part of administration is the method of accounting for the applications including the order in which they are received. (As earlier stated it is strongly recommended that applications be received only by mail.) Once received, a definitive and reliable method of "logging" them in is essential. This model recommends that, as each batch of applications is received daily, they be opened at random and immediately assigned their permanent number as described more fully under the heading of **TRACKING THE APPLICATIONS** which appears later in this section.

DESIGNING THE APPLICATION

"Should an applicant complete the form and send it to the program office, OR do they send it to the school of their choice?" This question, which was posed earlier under THE APPLICATION PROCESS is key to the designing of the new program's student application form. It also determines whether or not you will require a separate form for the School Application. Examples of this format are the San Antonio forms. Should this format be used, a number of changes are recommended based upon that city's experience. These recommendations, made for operational ease, are:

1. Regarding the Student Application form, include a space for the parent's work phone number; and,

2. Regarding the School Application form, include a space for the child(ren)'s permanently assigned number and telephone number. Also include a place for noting the expiration date of the program's scholarship commitment as this will help the school in accomplishing a timely response. Finally, it will prove helpful if the School Application form were a different color than the Student Application form.

Very important to keep in mind in the design of the application forms are the legal implications. To protect a program in today's litigious environment it is important to include in the application forms certain language which may serve to thwart off problems before they get out of control. To date the only program that has included such language is San Antonio (please refer to the forms in APPENDIX 2). The "small print" included in the Student Application Form calls for the parent to:

1. Certify that they qualify for the federal school lunch program;
2. Agree to the terms of the scholarship;
3. Recognize that scholarship awards are the sole

responsibility of the foundation, whose decisions are final;

4. Agree to have the child tested annually, if required.
5. Agree to give the program access to the child's school records;
6. Release the program from liability of any kind; and,
7. Recognize that the scholarship is renewable annually at the sole option of the foundation.

The author believes each of these points to be vital to the well being of a program. Indeed San Antonio's experience has already proven that having these legal aspects in place are well worth the effort.

A new program is strongly encouraged to study carefully the various versions of application forms offered in the appendix of this model. One parting piece of advice in this area - KEEP IT SIMPLE.

CATEGORIES OF APPLICATIONS

Each of the four existing CHOICE programs has some policy as to what percentage of funds were made available to families who already had been exercising educational CHOICE (generally meaning children in private school) versus families who wish to exercise CHOICE for the first time (generally meaning children coming from public school). Typically, though not always, this ratio is 50-50. This question is discussed in Section Four, DESIGNING THE PROGRAM.

Whatever the ratio between these two groups of children, it will be imperative that a reliable system be in place to, immediately upon receipt, categorize and assign the permanent ID numbers to these applications (with each category having its own numbering series). Tracking these two separate categories also means tracking the corresponding dollars associated with each....being careful not to over commit the available dollars in any one category.

WITHDRAWALS

Inevitably there will be people who, although accepted into the program, will drop-out prior to school starting. The reasons for this are numerous. Among the most common reasons are:

1. The family realizes they can not afford their portion of the tuition charge;

2. The school chosen has no room for the child; or,

3. The school chosen will not accept the child.

Tracking the reasons for withdrawals is very critical in terms of assessing the CHOICE movement nationwide. A new program is strongly encouraged to keep track of the various reasons a family withdraws from the program after having been accepted. Much can be learned by the many researchers of educational CHOICE if all programs will cooperate in this area.

One area of withdrawals that will certainly give rise to a policy question is the situation that comes about from a family who voluntarily withdraws from the program for financial reasons but requests a priority position for the following year (in hopes of being able to make the financial adjustment at that time). It is generally recommended that these families be put at the front of the subsequent year's waiting list.

PARTICIPATION IN FEDERAL SCHOOL LUNCH PROGRAM

It is not considered necessary that a particular school actually participate in the Federal School Lunch Program. What IS important is that the family does indeed qualify under the terms of that program.

CONCLUSION

For a program founded in such wonderful simplicity the complexities of its administration are surprising. This model in no way purports to cover every conceivable situation nor question. It is the hope of the author that, in studying the information offered in these pages, a potential program might discover the questions to ask, if not the answers as well.

The secret to the continued success of this movement is the free and unlimited exchange of information. Anyone interested in a local replication of this concept is encouraged and invited to contact an existing program for the purpose of learning from their experience.

SECTION ELEVEN

PROGRAM EVALUATION

If one were to look at the larger picture of effectuating systemic change in our country's educational system it becomes clear that any opportunity to critically evaluate a CHOICE program is vitally important. Today's CHOICE efforts are still considered "experiments" for which little credible evaluative data exists. SCHOOL CHOICE WITH A BITE has a tremendous opportunity to change that. In order to take advantage of that opportunity each CHOICE effort must have some type of compatible program evaluation (meaning compatible with each other for comparative sake). Not only must they be compatible but they must also be credible from a true research standpoint.

To be credible an evaluation project must be independently performed, valid in its design and execution, generally defensible. Of the four existing programs three have coordinated their evaluation efforts so they meet these criteria as well as the compatibility requirement.

Just as no scientist would ever contemplate conducting a laboratory experiment without documenting and evaluating it, neither should one consider a CHOICE experiment without committing to do the same. This therefore should be considered an absolute necessity.

To assist a potential new program the following pages present a synopsis of the research project designed by the University of North Texas for the CEO Foundation. The synopsis is followed by a roster of the individuals who serve on the advisory board of that study and who assist in assuring the credibility of that effort.

SAN ANTONIO SCHOOL CHOICE RESEARCH PROJECT

SUMMARY OF STUDY

The Center for the Study of Educational Reform in the UNT College of Education is proposing a comprehensive two-part school choice study involving a unique private sector scholarship program in San Antonio and the San Antonio Independent School District. The nature of the study is summarized below. Attachments provide additional detail. The principal researchers are Dr. Frank R. Kemerer, Regents Professor and Director of the Center; Dr. Ken Godwin, Professor and Department Chair of Political Science; and Dr. Valerie Martinez, Assistant Professor of Political Science.

Phase one of the research will evaluate over a three-year period the San Antonio-based Children's Educational Opportunity (CEO) Foundation scholarship program initiated by the Texas Public Policy Foundation and underwritten by private corporations. The CEO program assists low income families to enroll their children in private or out-of-district public school by offering tuition scholarships. The phase one study will also evaluate the significance of parent choice within the San Antonio Independent School District by studying its magnet school program. The study will examine the impact of both programs on student achievement, attendance, and behavior; on parent and student satisfaction levels; on school governance, curriculum, and finance; and on school reform. To make comparisons possible, matched groups of participants and non-participants in public and private schools will be established. Data will be gathered through survey instruments and structured interviews.

The purpose of phase two is to gain insight into the long range consequences of education on life successes. Drawing matched student samples from the same public and private schools employed in phase one, the researchers will examine the impact of various school characteristics on the lives of persons who either graduated or were initially in the graduating class of 1989. Information will be obtained about comparative graduation rates, continued education, employment, marriage, citizenship participation, and institutionalization. The phase two study will seek to learn what factors more and less successful persons identify about their education as critical in their life decisions and whether these factors differ by school type. This information should be particularly useful to participating schools as they seek to improve the quality of the education they offer.

Start-up funds from local contributors in San Antonio or other parts of Texas in the amount of $60,800 to cover the first six months of research are now being sought. Of this amount, $19,500 is needed immediately to begin phase one research prior to the CEO scholarship program start-up date of September 1992. The remainder of the three-year research funds estimated to be $275,000 will be sought from national research foundations.

June 5, 1992

CENTER FOR STUDY OF EDUCATION REFORM
UNIVERSITY OF NORTH TEXAS

ADVISORY RESEARCH COUNCIL - CHILDREN'S EDUCATIONAL OPPORTUNITY FOUNDATION

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DR. VALERIE MARTINEZ	ASSISTANT PROFESSOR OF POLITICAL SCIENCE - UNIVERSITY OF NORTH TEXAS

SECTION TWELVE

CONTACT PERSONS

The purpose of this final section is to offer a new program a list of various contact persons who would have an interest in new SCHOOL CHOICE WITH A BITE programs. These names appear here for many different reasons. Some could be considered resource people while others might be members of the media or educational publications. No matter what the reason for their interest, they are people who could be contacted for research, programmatic or publicity assistance.

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APPENDICES

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CHOICE Charitable Trust

Parents or guardians applying for a **CHOICE** Charitable Trust should read the enclosed information and complete the attached Application Form.

Parents or guardians must then submit the Application Form to the principal of the school of their choice.

Made possible by a contribution from
Golden Rule Insurance Company
Home Office: Lawrenceville, Illinois

Dear Parent or Guardian:

Does your elementary-school child:

Yes No
☐ ☐ Live within the Indianapolis Public Schools (IPS) district?

☐ ☐ Qualify for the "free" or "reduced price" lunch program?

Do you:

Yes No
☐ ☐ Want to pick the school your child attends?

☐ ☐ Want some help paying the school tuition?

If you answered "yes" to each of those questions, then you'll like the **CHOICE** Charitable Trust. This new program will pay half of your child's yearly tuition (up to $800) to go to a Catholic or other private elementary school in Marion County.

That means that if the school's tuition is $1600, **CHOICE** will pay $800. If the tuition is $1200, **CHOICE** will pay $600. If its $2400, then **CHOICE** will pay $800.

What do you have to do? Just three things:

1. Enroll your child in the school of your choice.
2. Fill out the enclosed application form and have the school return it to the **CHOICE** Charitable Trust.
3. Pay your share of the tuition when it's due.

That's all there is to it! **CHOICE** will pay its share directly to the school.

Your child's past grades don't matter. This is first-come, first-served. There are a limited number of grants available, so don't wait. Sign up now!

This is a three-year commitment from the **CHOICE** Charitable Trust, and we fully expect in the future to fund your child's education through the 8th grade. We've given you a choice. Now it's up to you.

CHOICE Charitable Trust Grant

Application Form

NOTE: TO APPLY, CHIDREN MUST LIVE WITHIN IPS BOUNDARIES.

Student's name: ______________________________

Date of birth: ________

Elementary school presently attending: ______________________________

Present grade: ________

Parochial or private elementary school you would like your child to attend:

____
(school name)

____
(school address)

(The school can be located anywhere in Marion County.)

Parent or guardian's name: ______________________________

Home address: ______________________________
(street address)

____
(city) (state) (zip code)

Home phone: ____________ No phone, but can be reached at: ____________

Child's address (if different):

____
(street address)

Indianapolis, IN ____________
(zip code)

(Parent or Guardian: Check Appropriate Boxes)

______ My child qualifies for the "free" or "reduced price" lunch program.

______ As this child's parent or guardian, I pledge to keep current on tuition and fee payment to the school my child attends. (Grant payments will continue as long as you stay current.)

Parent or guardian's signature: ______________________________

Date: ____________

Relationship to child: ____________________

CHOICE Charitable Trust Grant

School Application Form

For school's use only. To be completed by the principal or other duly delegated school representative.

Please complete and sign the form.

_________ Our school is participating in the **CHOICE** Charitable Trust.

_________ We acknowledge that **CHOICE's** continued payment is contingent on the parent or guardian remaining current on the fee and tuition payments to our school. We agree to monitor this situation and report the payment status of each grant recipient to **CHOICE** as a condition of receiving grant payments.

_________ This applicant, ______________________________, qualifies for the "free lunch" or "reduced lunch" program and lives within IPS boundaries. The applicant is thereby qualified to receive a **CHOICE** Charitable Trust grant.

_________ We agree to maintain documentation of eligibility for free and reduced lunch for this grant recipient and to provide access to the documentation for audit purposes by **CHOICE** or its designated representatives if requested.

TUITION INFORMATION

The **CHOICE** Charitable Trust will match its grant payment to the tuition payment plan selected by the parent or guardian. Payments are contingent on the parent or guardian remaining current on all tuition and fee obligations to the school.

Please provide the following:

School tuition for 1991-1992 school year .... __________

CHOICE grant (50% of tuition up to $800 maximum) .... __________

Parent or guardian's obligation (tuition less **CHOICE** grant) .... __________

Payment option parent or guardian chose (monthly, quarterly, etc.) .... __________

Amount of each tuition payment by parent or guardian .... __________

Amount of each grant payment by **CHOICE** .... __________

Date payment due .... __________

Signature of Principal or Duly Authorized Delegate

Signature ______________________________ Date ______________

Print Name ______________________ Title ______________________

School ______________________

Address ______________________

____

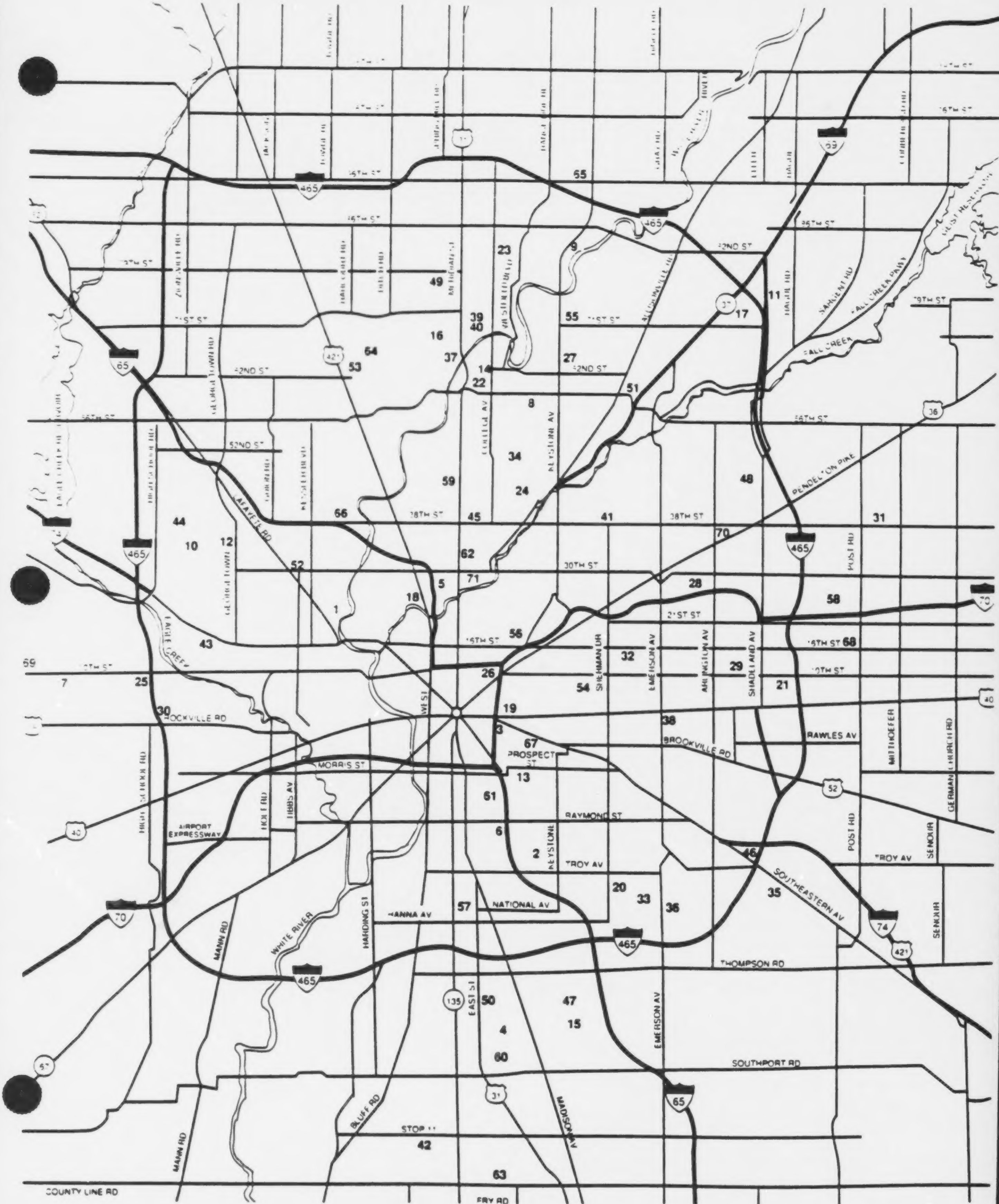
Phone ______________________

RETURN APPLICATION TO:

CHOICE Charitable Trust
c/o Golden Rule Insurance Company
7440 Woodland Drive
Indianapolis, IN 46278-1719
(317) 293-7600

NOTE: **The CHOICE Charitable Trust** is in the process of formation. Until it is in operation, the funds will be provided directly by Golden Rule Insurance Company.

Marion County Nonpublic/Private Schools



96TH ST
86TH ST
79TH ST
75TH ST
71ST ST
62ND ST
56TH ST
52ND ST
46TH ST
38TH ST
30TH ST
21ST ST
16TH ST
10TH ST
ROCKVILLE RD
MORRIS ST
PROSPECT ST
RAYMOND ST
TROY AV
HANNA AV
NATIONAL AV
THOMPSON RD
SOUTHPORT RD
STOP 11
COUNTY LINE RD
FRY RD
BROOKVILLE RD
RAWLES AV
SOUTHEASTERN AV
PENDLETON PIKE
FALL CREEK
FALL CREEK PKWY
SARGENT RD
LAFAYETTE RD
EAGLE CREEK
AIRPORT EXPRESSWAY
WHITE RIVER
MANN RD
BLUFF RD
HARDING ST
TIBBS AV
HOLT RD
WEST ST
EAST ST
MADISON AV
KEYSTONE AV
COLLEGE AV
EMERSON AV
SHERMAN DR
ARLINGTON AV
SHADELAND AV
POST RD
MITTHOEFER
GERMAN CHURCH RD
SENOUR
GEORGETOWN RD
HAGUE RD
465
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Marion County Nonpublic/Private Schools

1. All Saints Catholic School
337 N. Warman Avenue
Indianapolis, IN 46222

2. Baptist Academy
2565 S. Villa Avenue
Indianapolis, IN 46203

3. Calvary Christian School
902 Fletcher Avenue
Indianapolis, IN 46203

4. Calvary Lutheran School
6111 Shelby Street
Indianapolis, IN 46227

5. Capitol City SDA School
2143 Boulevard Place
Indianapolis, IN 46202

6. Central Catholic School
1115 E. Tabor Street
Indianapolis, IN 46203

7. Chapel Hill Christian
1055 N. Girls School Road
Indianapolis, IN 46241

8. Christ The King School
5858 Crittenden Avenue
Indianapolis, IN 46220

9. Colonial Christian School
8140 Union Chapel Road
Indianapolis, IN 46240

10. Crusader Christian Academy
3507 N. Whitcomb Avenue
Indianapolis, IN 46224

11. Divine Savior
Evangelical Lutheran
7315 E. 75th Street
Indianapolis, IN 46256

12. Eagledale Christian School
4950 W. 34th Street
Indianapolis, IN 46224

13. Emmaus Lutheran School
1224 Laurel
Indianapolis, IN 46203

14. Gage Institute For Gifted
6144 N. College Avenue
Indianapolis, IN 46220

15. Gray Road Christian School
5500 S. Gray Road
Indianapolis, IN 46237

16. Hebrew Academy
Of Indianapolis
6602 Hoover Road
Indianapolis, IN 46260

17. Heritage Christian School
6401 E. 75th Street
Indianapolis, IN 46250

18. Holy Angels Catholic School
2822 Dr. M. Luther King Jr. St.
Indianapolis, IN 46208

19. Holy Cross Central School
125 N. Oriental Street
Indianapolis, IN 46202

20. Holy Name School
21 N. 17th Street
Beech Grove, IN 46107

21. Holy Spirit School
7241 E. 10th Street
Indianapolis, IN 46219

22. Immaculate Heart School
317 E. 57th Street
Indianapolis, IN 46220

23. Indiana School For The Blind
7725 N. College Avenue
Indianapolis, IN 46240

24. Indiana School For The Deaf
1204 E. 42nd Street
Indianapolis, IN 46205

25. Indianapolis Christian School
612 N. High School Road
Indianapolis, IN 46224

26. Indianapolis Christian School
620 E. 10th Street
Indianapolis, IN 46202

27. Indianapolis Junior Academy
2910 E. 62nd Street
Indianapolis, IN 46220

28. LPP & Arlington
Elementary School
5935 E. 27th Street
Indianapolis, IN 46218

29. LPP & Arlington
Elementary School
6040 E. Pleasant Run Pkwy S Dr
Indianapolis, IN 46219

30. Lakeview Christian Academy
47 Beechway Avenue
Indianapolis, IN 46224

31. Lord of Life Christian School
9348 E. 38th Street
Indianapolis, IN 46236

32. Little Flower
1401 N. Bosart Avenue
Indianapolis, IN 46201

33. Montessori Children's House
222 S. 4th
Beech Grove, IN 46107

34. Montessori Children's House
1224 E. 52nd Street
Indianapolis, IN 46205

35. Nativity School
3310 S. Meadow Drive
Indianapolis, IN 46239

36. Nazarene Christian Schools
5152 Hornet Avenue
Beech Grove, IN 46107

37. Orchard Country Day School
615 W. 63rd Street
Indianapolis, IN 46260

38. Our Lady of Lourdes School
30 S. Downey Avenue
Indianapolis, IN 46219

39. Park Tudor School (6-12)
7200 N. College Avenue
Indianapolis, IN 46240

40. Park Tudor School (PK-5)
7200 N. College Avenue
Indianapolis, IN 46240

41. Saint Andrew
The Apostle School
4050 E. 38th Street
Indianapolis, IN 46218

42. Saint Barnabas School
8300 S. Rahke Road
Indianapolis, IN 46217

43. Saint Christopher School
5335 W. 16th Street
Indianapolis, IN 46224

44. Saint Gabriel School
6000 W. 34th Street
Indianapolis, IN 46224

45. Saint Joan of Arc School
500 E. 42nd Street
Indianapolis, IN 46205

46. Saint John Evangelist
Lutheran School
6630 Southeastern Avenue
Indianapolis, IN 46203

47. Saint Jude Elementary School
5375 McFarland Road
Indianapolis, IN 46227

48. Saint Lawrence School
6950 E. 46th Street
Indianapolis, IN 46226

49. Saint Luke School
7650 N. Illinois Street
Indianapolis, IN 46260

50. Saint Mark School
541 E. Edgewood Avenue
Indianapolis, IN 46227

51. Saint Matthew School
4150 E. 56th Street
Indianapolis, IN 46220

52. Saint Michael Church
3352 W. 30th Street
Indianapolis, IN 46222

53. Saint Monica School
6131 N. Michigan Rd. N.W.
Indianapolis, IN 46208

54. Saint Philip Neri School
565 Eastern Avenue
Indianapolis, IN 46201

55. Saint Pius X School
7200 Sarto Drive
Indianapolis, IN 46240

56. Saint Rita School
1800 N. Arsenal
Indianapolis, IN 46202

57. Saint Roch School
3603 S. Meridian Street
Indianapolis, IN 46217

58. Saint Simon
The Apostle School
8400 E. Roy Road
Indianapolis, IN 46219

59. Saint Thomas Aquinas School
4600 N. Illinois Street
Indianapolis, IN 46208

60. Southport Presbyterian School
1427 Southview Drive
Indianapolis, IN 46227

61. Spirit Filled Baptist Academy
743 E. Weghorst
Indianapolis, IN 46203

62. St. Richard School
Foundation
3243 N. Meridian Street
Indianapolis, IN 46208

63. Suburban Baptist School
722 E. S. County Line
Indianapolis, IN 46227

64. Sycamore School
1730 W. 64th Street
Indianapolis, IN 46260

65. Tabernacle Christian
Academy
2599 E. 98th Street
Indianapolis, IN 46280

66. The Children's House
2401 W. 39th Street
Indianapolis, IN 46208

67. Trinity Christian School
440 St. Peter Street
Indianapolis, IN 46201

68. Trinity Lutheran School
8540 E. 16th Street
Indianapolis, IN 46219

69. Westside Christian School
8610 W. 10th Street
Indianapolis, IN 46234

70. Witness for Christ School
6190 E. 38th Street
Indianapolis, IN 46218

71. Worthmore Academy
609 E. 29th Street
Indianapolis, IN 46205

INCOME ELIGIBILITY GUIDELINES

(Effective from July 1, 1991, to June 30, 1992)

FOR THE 48 CONTIGUOUS UNITED STATES, DISTRICT OF COLUMBIA, GUAM AND TERRITORIES

Household Size	Free Meals			Reduced Price Meals		
	Annual	Month	Week	Annual	Month	Week
1	$ 8,606	$ 718	$ 166	$12,247	$1,021	$ 236
2	11,544	962	222	16,428	1,369	316
3	14,482	1,207	279	20,609	1,718	397
4	17,420	1,452	335	24,790	2,066	477
5	20,358	1,697	392	28,971	2,415	558
6	23,296	1,942	448	33,152	2,763	638
7	26,234	2,187	505	37,333	3,112	718
8	29,172	2,431	561	41,514	3,460	798
For each additional family member add . . .	+2,938	+245	+57	+4,181	+349	+81

FOR SPONSOR USE ONLY – FOR APPROVAL OF FREE AND REDUCED PRICE MEAL APPLICATIONS

QUESTIONS AND ANSWERS
ABOUT THE
CHOICE CHARITABLE TRUST

Q. What is the purpose of the CHOICE Charitable Trust?

A. Our aim is to help moderate- and low-income families offset the cost of tuition at the private school of their choice. Today, only well-to-do parents can choose the school that best meets their child's needs. It isn't fair that the economically disadvantaged families in our society lack that option. We want to change this by offering more parents the opportunity to get the best education for their children.

We have no illusions. We're not going to be able to help every child in Indianapolis who wants to attend a private or Catholic school. What we hope to do is make a difference in as many disadvantaged children's lives as possible, children that won't get any help if the solution to the education problem continues to be talk. We are taking action, action that we hope will introduce competition into Indianapolis's educational picture and force the local public schools to improve.

Q. How do children qualify for the CHOICE Charitable Trust?

A. There are two criteria:

1. The child must live within the Indianapolis Public Schools district boundaries.
2. The child must qualify for the free or reduced-price lunch program.

Q. What if a child already attends a nonpublic school?

A. It doesn't matter. The CHOICE Charitable Trust wants to help those families that are willing to make a sacrifice. We will make available up to half the grants to students currently enrolled in private or Catholic schools.

Q. How can the parents find out whether their child does qualify for the lunch program?

A. They can check the "Income Eligibility Guidelines" sheet in the information packet. And they can then ask the principal at the private school they visit.

Q. Who gets in? Are grades important?

A. This program is strictly first-come, first-served. It is not an academic scholarship, but a need-based grant. The only academic requirement is that the student continues to be enrolled in the school.

Q. How do these moderate- and low-income families obtain the necessary information? They may not be able to get up to the Golden Rule office.

A. We have established a dedicated phone line (293-7600) to take people's names and addresses. This line is open from 8 a.m. to 8 p.m., Monday through Friday, and then from 8 a.m. to 1 p.m. on Saturday. We will then send those people who have called in an information package, which contains the application and a list and map of the nonpublic schools. The information will also be available at Parent Information Centers located around the city, and the principals of the nonpublic schools will also have information packets. We also hope to enlist the aid of ministers throughout the inner city. All the families have to do is take the application to the school of their choice and, upon enrollment, the principal will complete the school's portion of the application and return it to the CHOICE Charitable Trust.

Q. Why are you encouraging children to leave public schools for private schools?

A. We are merely providing families with financial assistance so that they have the option to choose the best school for their children.

Q. Do you prefer that the children attend Catholic schools?

A. Not necessarily, although there is an abundance of information showing that students in the Catholic school system are getting an excellent education, certainly superior to the public system. There is, however, a wide variety of other parochial schools -- Baptist, Lutheran, Christian -- and of private schools. Our program is based on a simple concept: We'll let the parents decide.

Q. How large a subsidy are you offering?

A. We will contribute one-half a child's tuition up to $800. If the tuition is $1600, we'll pay $800. If it's $1200, $600. And if it's $2000, we'll pay the maximum, $800.

Q. Is this a realistic amount?

A. Most tuitions seem to be in the $1200 to $1600 range, so we believe this is an adequate amount.

Q. Why not just pay the whole tuition for the families? Then you'd know for certain they can afford private schooling.

A. This is not a handout, it's a helping hand. We want the families to have a stake in this endeavor. If they're also contributing to the cost of the education, we believe they will be more involved in their child's schooling.

Q. Can a school also contribute to helping a family pay for its child's education at that school?

A. Certainly. If a school wishes to offer a scholarship, we would welcome the additional assistance. We do not, however, want schools simply accepting the Trust's contribution as payment in full.

Q. What if a family enrolls its child in a school under the grant program and then has trouble keeping up with the payments as the semester progresses?

A. We'll look at those families on a case-by-case basis, but it is expected that families are to stay current on their tuition payments to the school in order for the grant to continue.

Q. So what happens next year? What good will one year of private schooling do for kids?

A. This is not an experiment, it's a commitment. We are committed to carry on this program for three years and fully expect to carry each child through until the eighth grade. The continuation in those subsequent years depends upon the continued strong financial condition of Golden Rule and the success we have in attracting additional support to the CHOICE Charitable Trust.

Q. Why only elementary-school children? Are you abandoning the high schoolers?

A. Our trust has only limited resources that must be put to the best use. The available evidence shows that the sooner you catch a child, the more effect you will have. So we believe we must help the elementary-school children first.

Q. Look, this was tried and failed in Milwaukee. Why repeat the same mistake in Indianapolis?

A. It's way too soon to declare the Milwaukee experience a failure. One year is not enough time to break down the barriers -- many simply psychological -- that have kept people from looking at private schools. Unlike the Milwaukee program, we are including church schools. And the fact that we are using private money will allow for more flexibility in the program, which may alleviate many of the problems that occurred in Milwaukee.

Q. Doesn't this leave these low-income families wide open to exploitation by private schools?

A. For some strange reason, many people seem to believe that parents, particularly poor parents, are not capable of making decisions about their children's education. We find that attitude to be both condescending and demeaning. Having a low level of income does not exclude you from making intelligent decisions or from being intelligent. Positions in our society are more often than not decided by the circumstances of birth. We have confidence in the ability of parents and families to make the best decisions for their children, without a government bureaucracy telling them what to do.

This whole program has been set up with one idea in mind -- to give parents and families power to make decisions based on what is best for their children.

Q. Although this program helps the children gain entrance to private schools, how are they going to get there?

A. Transportation is a problem for many low-income families. There are a couple of options for them to pursue:

1. They arrange for transportation themselves, whether by the child walking to school, their driving the child, or by sharing rides with other school families.

2. The law states, "When school children who are attending a parochial school in any school corporation reside on or along the highway constituting the regular route of a public school bus, the governing body of the school corporation shall provide transportation for them on the school bus." We understand that this statute is interpreted to mean children attending any nonpublic school. If IPS fulfills its statutory responsibilities, then many of the children lacking the necessary transportation to a private or parochial school could be accommodated.

Q. Isn't this going to cost IPS money when these children leave the system to enter private schools?

A. The dollars that IPS has allocated for the 500 students this year will stay with IPS. In other words, the dollars per child to educate the remaining children will actually go up.

Q. Now, most of these families will choose neighborhood schools, so isn't this just a backdoor way around desegregation?

A. Our interest is in access to better education and empowerment for society's economically disadvantaged, not in racial politics. Besides, if this forces the public schools to improve, then the parents may choose to keep their children in public schools. Either way, the children win, and that's all we're interested in.

GOLDEN RULE: A HISTORY OF LENDING A HAND

Interest in education and the disadvantaged is not a new development at Golden Rule.

The Company's involvement in education dates back to 1976, when it sued Educational Testing Service and the Illinois Department of Insurance accusing both parties of using culturally biased tests. These tests were used to exclude certain persons from entering the insurance business in Illinois.

Golden Rule demanded that ETS-administered tests for prospective insurance agents and brokers be stopped. The Company believed the new testing requirements discriminated against noncollege-educated persons, blacks and other minorities, and people over 50 years of age.

Eight years and many dollars later, Golden Rule proved to be the victor. The settlement, which has since been known as the "Golden Rule settlement," called for ETS to redesign its test and submit to outside oversight of future tests.

Additionally, a 12th grade reading level would be a requirement for understanding future tests, and future examinations would have to display items that show the least difference in passing rates between black and white examinees.

This precedent-setting settlement was the subject of an article in the Valparaiso University Law Review (Winter 1989).

"We filed this lawsuit because we believe every person should have the same opportunity to enter a profession, no matter what their socioeconomic background," says J. Patrick Rooney, Golden Rule Insurance Chairman of the Board.

Realizing that the problem of unfair and discriminatory testing was not limited to the insurance industry and riding the success of its victory, Golden Rule helped form FairTest in 1985. Today, Golden Rule is still a principal source of funding for the organization.

Other prominent foundations, such as the Lilly Endowment, the

Ford Foundation, and the Rockefeller Family Fund, have followed Golden Rule's lead in backing FairTest.

Located in Cambridge, Massachusetts, FairTest is the leading testing-reform organization in the country.

"Our objective is to stop the misuse and overuse of multiple choice questions on standardized tests," says Cinthia Schuman, executive director of FairTest. "We ensure that the evaluation of students and employees is fair, open, accountable, and educationally sound."

In addition to fighting for nondiscriminatory testing, Golden Rule has also worked to prepare students for the future.

In 1983, Golden Rule contributed $24,644 to George Washington High School, Evening Division, Indianapolis Public Schools. The money enabled the school to purchase an IBM Displaywriter, which consisted of hardware for three work stations, software, and a start-up kit and supplies.

Pat Rooney served on the Advisory Committee for Adult Education at the high school. Through the committee, Pat became aware of information and data that showed a need for word processors in the marketplace.

The computer equipment was used to teach and to prepare students for word-processing careers. Both adult-education and day students benefited from the computers.

"It means jobs and income for graduates, many of whom are minority students," says Rooney.

Understanding that education extends beyond text books and classrooms, Golden Rule has donated money and office equipment to Fiesta Indianapolis, a part of the Hispanic Center of Indianapolis.

Over the last eight years, these donations have been used to promote the Gala Dance and the Festival, which are celebrations of the art and culture of the Hispanic community of Indianapolis.

This recent announcement by Golden Rule to help students get a "Grade A" education is the latest in the history of Golden Rule lending a helping hand to the public. We try hard to live up to our name.

CEO FOUNDATION

Children's Educational Opportunity Foundation

PROGRAM SYNOPSIS

PURPOSE

The purpose of the CEO Foundation is to assist in equalizing educational opportunities for Bexar County elementary school students by offering low income families an educational option normally denied them because of cost.

QUALIFICATIONS TO APPLY

Applicants must meet the following criteria to be eligible to apply:

1. The student must be a resident of Bexar County;
2. The student must qualify for the federal "free or reduced price" lunch program; and,
3. The student must be entering grades 1st through 8th.

There are no other eligibility requirements.

EFFECTIVE DATE

The effective date of the scholarship program is the fall semester of 1992. Applications will be accepted beginning April 16, 1992.

NUMBER OF SCHOLARSHIPS TO BE AWARDED

The CEO Foundation through is corporate sponsors, is committing $1,500,000.00 in grant money over a three years period. This should translate to at least 700 students. Of these 700 tuition grants, we will allot one-half, or 350, for students who are already enrolled in private school and 350 for students who wish to transfer to a school of their choice (public or private). If a student is accepted into the program, we will commit to that student for a three year period under the terms of the application.

STUDENT APPLICATION PROCESS

This program is first come, first served for the first 700 applications - or until the $500,000.00 budgeted for the first year is totally committed. The application process is therefore a critical step in ·terms of timeliness. To ensure equal access to all families interested in applying for a grant, the San Antonio Express-News newspaper, one of the program sponsors, will publish the application forms on April 6th and again on April 21st. The applications will likewise appear in the Southside and Westside Sun newspapers on April 16th and April 23rd. Applications can also be obtained by contacting the foundation office.

An interested family should submit one application form for each child they wish to enter into the program (photocopies of the application are permissible). In order to complete the form, the family must contact the school of their choice to get pertinent information such as tuition rates, fees, grade openings, etc. Once completed they should immediately mail the form to the foundation offices. If they are eligible, and if they are among the first 700 applications received, we will issue a Tuition Voucher in the name of the child (or children) identifying the school they have chosen. They are to submit that voucher to the school and apply for formal registration. The voucher will serve as the school's assurance that grant monies have been allocated for that student.

SCHOOL APPLICATION PROCESS

IF the school accepts the student for enrollment, it is to complete the CEO Foundation School Application form and mail it to the foundation together with the tuition voucher. It is imperative that the school agree to the basic terms of the grant, the proceeds for which will be paid directly to the school on the payment program chosen by the parent.

It is important that the school realize that the foundation's continued payment is strictly contingent upon the parent remaining current on all fees and tuition charges and the child remaining in school.

Generally there is no limit to the number of CEO Foundation program children enrolled at any given school.

DURATION OF PROGRAM

Once accepted into the program, we will commit to the student for three years. If during that time the student enters ninth grade and wishes to continue in a private school of their choice, we will continue our support under the same terms and condition.

INCLUSION OF PUBLIC SCHOOLS

The message of the CEO Foundation is about educational choice. If a family wishes to choose a public school that is willing to enroll the student subject to a tuition charge, the CEO Foundation will process the application. A school does not have to be a private school to participate in this program.

PROGRAM SPONSORS

The CEO Foundation is jointly sponsored by the Kinetic Concepts Foundation, USAA Federal Savings Bank, and the San Antonio Express-News newspaper.

CEO
FOUNDATION
Children's Educational Opportunity Foundation

Questions and Answers
About the
Children's Educational Opportunity Foundation

Q. What is America 2000?

A. America 2000 is an education strategy developed by all 50 United States governors together with President Bush and the Secretary of Education. It is a program of six specific educational goals to be reached by the year 2000.

Q. What is the purpose of the CEO Foundation?

A. The purpose of the CEO Foundation is to equalize educational opportunities for San Antonio students by offering low income families a private school option normally denied them because of cost.

Q. How do children qualify to apply for a CEO Foundation grant?

A. There are three criteria:

1. The child must live within Bexar County.
2. The child must qualify for the federal free or reduced-price lunch program.
3. The child must be entering grades 1st - 8th.

Q. What if a child already attends a non-public (private) school?

A. It doesn't matter. The CEO Foundation wants to help those families who are willing to make a sacrifice. We will make available up to one-half of the grants to students currently enrolled in private schools.

Q. How can the parents find out whether their child qualifies for the federal school lunch program?

A. They can check the "Income Eligibility Guidelines" sheet on the back of the application form or they can then ask the principal at the school they wish their child to attend.

Q. Who gets in? Are grades important?

A. This program is strictly first-come, first-served. It is not an academic scholarship, but a need-based grant. The only academic requirement is that the student continues to be enrolled in the school.

Q. How do these moderate- and low-income families obtain the necessary information?

A. Information and application forms are available at the business office of each private school (see list attached) and they are also periodically published in the San Antonio Express-News newspaper. A family who wishes to apply should complete the form and return it to the CEO Foundation. Upon acceptance of the student(s) by the school, the principal will complete the school's application and return it to the CEO Foundation. Or you may call the CEO Foundation office at (512) 829-0305 for more information.

Q. Are you encouraging children to leave public schools for private schools?

A. We are merely providing families with financial assistance so that they have the option to choose the best school for their children.

Q. What if parents choose a PUBLIC SCHOOL which is willing to enroll the child for a tuition charge? Will the CEO Foundation accept scholarship applications in these cases?

A. Yes. If a public school chosen by the parents accepts the student, the CEO Foundation will gladly process the application subject to the same terms and limitations as any other application. A school does not have to be a private school to participate in this program.

Q. Do you prefer that the children attend Catholic schools?

A. Not necessarily. While there is an abundance of information showing that students in the Catholic school system are getting an excellent education, there is a variety of other excellent private schools -- Baptist, Lutheran, Christian, Episcopalian, etc. Our program is based on a simple concept: Give the parents the opportunity to choose.

Q. How large a subsidy are you offering?

A. We will contribute one-half of a child's annual tuition up to $750. If the tuition is $1,500, we'll pay $750. If it's $1,200, we'll pay $600. And if it's $2,000, we'll pay the maximum, $750.

Q. Is this a realistic amount?

A. Most tuitions seem to be in the $1,200 to $1,600 range, so we believe this is a realistic amount.

Q. Why not just pay the whole tuition for the families? Then you'd know for certain they can afford private schooling.

A. This is not a hand-out, it's a helping hand. We want the families to have a stake in this endeavor. If they're also contributing to the cost of the education, we believe they will be more involved in their child's education.

Q. Can a school also contribute to helping a family pay for its child's education?

A. Certainly. If a school wishes to offer a scholarship, we would welcome the additional assistance. We do not, however, want schools simply accepting the Foundation's contribution as payment in full.

Q. So what happens next year? What good will one year of private schooling do for kids?

A. This is not a one year experiment, it's a three year commitment. The continuation of the program depends upon the progress of the students and the success we have in attracting additional support for the CEO Foundation.

Q. Why only elementary-school children? Are you abandoning the high schoolers?

A. The CEO Foundation has only limited resources that must be put to the best use. We believe that the earlier you catch a child, the more effect you will have. So we believe we must help the elementary-school children first. However, if a child in the program enters high school during the three year commitment, the CEO Foundation will continue the grant under the same terms and conditions.

Q. Doesn't this program leave these low-income families wide open to exploitation by private schools?

A. For some reason, many people seem to believe that parents, particularly low-income parents, are not capable of making decisions about their children's education. We find that attitude to be both condescending and demeaning. Having a low level of income does not exclude one from making intelligent decisions or from being intelligent. We have confidence in the ability of parents and families to make the best decisions for their children.

Q. Although this program helps children gain entrance to private schools, how are they going to get there?

A. Transportation may be a problem for many low-income families. They must arrange for transportation themselves, whether by their driving the child or by sharing rides with other school families.

CEO
FOUNDATION
Children's Educational Opportunity Foundation

A Private Sector Response to the Challenge of America 2000: An Education Strategy

Parents or guardians applying for a three year grant from the CEO Foundation for one-half of the private school tuition (maximum $750 per year, per child) should read the enclosed information and complete the attached Application Form.

To qualify you must meet ALL of the following:

1. **The student must live and go to school in Bexar County;**
2. **The student must be entering grades 1st through 8th;**
3. **The family must qualify for the federal "free" or "reduced price" lunch program (see back of application to see if you qualify);**
4. **You must agree to all of the terms of the attached application;**
5. **You must be one of the first 700 applications to be received (first come, first served).**

Made possible by a contribution from
The KCI Foundation, USAA Federal Savings Bank,
and the San Antonio Express-News
San Antonio, Texas

Children's Educational Opportunity Foundation
P.O. Box 17447
San Antonio, Texas 78217
(512) 829-0305

An Educational Initiative of the Texas Public Policy Foundation.

Children's Educational Opportunity Foundation

Step By Step Instructions

To apply for a three year CEO Foundation grant for one-half of the private school tuition (maximum of $750 per child, per year) you should carefully follow these simple steps:

STEP #1 Determine if you qualify for the grant. Refer to the back of the application to see if you qualify for the federal "free" or "reduced price" lunch program.

STEP #2 If you do qualify, select the school you want your child or children to attend and immediately contact them about tuition rates, registration criteria, fees, and openings in your child's (or children's) grade.

STEP #3 Once you have identified the costs you would have to pay, and whether or not the school has openings in your child's grade, then complete, sign, and mail the Student Application Form to the CEO Foundation. The program is first come, first served, therefore you must be one of the first 700 applications received to be eligible. It is important that you understand and agree to the terms outlined in the application.

STEP #4 If you wish to apply for a grant for more than one child in your family to attend the same private school (1st through 8th grades), you may do so provided that you complete an application form for each child and mail them all together to the CEO Foundation. They must be among the first 700 applications received in order to be eligible.

STEP #5 If you are among the first 700 applications received you will receive a tuition voucher by mail which you must immediately take to the private school you have chosen to formally register your child (or children). It is strictly up to the school whether or not they accept the child for enrollment.

STEP #6 Once the school has accepted your child (or children) the school must complete and return the School Application Form to the CEO Foundation within the period to be specified on the tuition voucher. We will provide the school with this form.

STEP #7 If your application was among the first 700 received and the school accepts your child (or children) for enrollment within the time specified on the voucher, the CEO Foundation will commit to pay directly to the school one-half of the annual tuition charge, up to $750 per child, per year, for up to three years.

P. O. Box 17447 • San Antonio, Texas 78217 • (512) 829-0305

Children's Educational Opportunity Foundation

1992-93 Student Application Form

To be completed by the parent or guardian: *Photocopies of this application are acceptable.*

Student's name: ______________________________

Date of birth: ____ / ____ / 19 ____ Present grade (1991-92 School Year): ______________

Elementary school presently attending: ______________________________

This is a: _____ Public School _____ Private School

Parochial or private elementary school you would like your child to attend in Bexar County:

____
(school name)

____
(school address)

____
(school phone number)

Annual Tuition: $ ____________
(Do not include fees, books, uniforms, or other charges.)

Father's name: ______________________________

Mother's name: ______________________________

Guardian's name: ______________________________

Home address: ______________________________
(street address)
____
(city) (state) (zip code)

Home phone: ______________ No phone, but can be reached at: ______________

Child's address (if different): ______________________________
(street address)
____
(city) (state) (zip code)

I certify that my child qualifies for the "free" or "reduced price" lunch program and I promise to keep current on tuition and fee payments to the private school my child attends. I understand that grant payments will continue only as long as my child is enrolled and I stay current on the tuition and fee payments. Further, I understand that this is a first come first served program and that grant awards are the sole responsibility of the CEO FOUNDATION, and all decisions are final. Also, I agree to have my child who has been accepted to this grant program to be annually tested in order to allow the CEO FOUNDATION to measure his or her's performance. I also agree to allow the CEO FOUNDATION access to my child's past and future school records. Finally, I agree to release the CEO FOUNDATION from any liability in its efforts to provide this three year educational grant which is renewable annually at the sole option of the CEO FOUNDATION.

Parent or guardian's signature: ______________________ Date: ______________

Relationship to student: ☐ Mother ☐ Father ☐ Guardian

Student's signature: [ ]
(Please sign within the brackets.)

Federal School Lunch Program

INCOME ELIGIBILITY GUIDELINES

(Effective from July 1, 1991, to June 30, 1992)

For the 48 contiguous United States, District of Columbia, Guam, and territories.

Your family qualifies for the "free" or "reduced price" lunch program if:

The Total Number of People In Your Household Is:	And Your Total Family Income Is Less Than:		
	Annually	Monthly	Weekly
1	$12,247	$1,021	$236
2	16,428	1,369	316
3	20,609	1,718	397
4	24,790	2,066	477
5	28,971	2,415	558
6	33,152	2,763	638
7	37,333	3,112	718
8	41,514	3,460	798
For each additional family member add:	4,181	349	81

SAMPLE

CEO FOUNDATION

Children's Educational Opportunity Foundation

Tuition Voucher

Congratulations! Your application to the Children's Educational Opportunity Foundation was among the first received. You are therefore eligible for a three year tuition grant provided your child is accepted at the school you have chosen in your application:

Take this tuition voucher to the school listed above and apply for entrance for your child. Upon acceptance of the child, the school should immediately submit the school application form to the CEO Foundation office. In order for your child to be approved for the grant, the CEO Foundation must receive the school's application form no later than:

If the CEO Foundation does not receive the school's application form by this date, your child's eligibility may expire. If for some reason the school is unable to enroll the student, you should choose another school immediately and contact the Foundation office.

All terms and conditions to which you have agreed on the student application form apply.

James R. Leininger, MD

Chairman

Not Redeemable   No Cash Value   Not Transferable

P.O Box 17447, San Antonio, TX 78217   (512) 829-0305

Children's Educational Opportunity Foundation

For school's use only.

Photocopies of this application are acceptable.

1992-93 School Application Form

Name of Student(s):

____________________ ( ) Grade Entering ____________________ ( ) Grade Entering ____________________ ( ) Grade Entering

First Child — Second Child (if applicable) — Third Child (if applicable)

Student's Address: ____________________ Zip: __________

School Name: ____________________ Phone: __________

School Address: ____________________ Zip: __________

Contact Person: ____________________ Title: __________

Yes No

☐ ☐ Our school has accepted the above student(s) for enrollment.

☐ ☐ We certify that this family qualifies for the "free" or "reduced price" federal lunch program (see qualifying data on the reverse side of this form.) We understand that it is not a requirement that our school actually be a participant in the federal school lunch program.

TUITION INFORMATION

The CEO Foundation will match the tuition payment plan chosen by the parent or guardian (this is for tuition only and will not include fees or other charges). The Foundation will pay, directly to the school, one-half of the annual tuition up to $750 per child. Please provide the following information.

Annual tuition charge for (complete in the applicable line only):

$ __________ Total for 1 child

$ __________ Total for 2 children

$ __________ Total for 3 children

Please give us the tuition payment amounts and the payment due dates:

Payment No.	Tuition Payment Due To School	Due Date	Payment No.	Tuition Payment Due To School	Due Date
1			6		
2			7		
3			8		
4			9		
5			10		

Our school wishes to participate in the CEO Foundation. We acknowledge that the CEO Foundation's continued payment is strictly contingent upon the parent or guardian remaining current on all fees and tuition payments and the child remaining in school. We agree to monitor this situation and report monthly to the CEO Foundation, on the form provided, on the payment status of each student as a condition of receiving grant payments. We agree to maintain whatever documentation of eligibility is required by the government for the "free" or "reduced price" lunch program for this grant recipient and to provide access to such documentation, if any, for audit purposes by the CEO Foundation or its representatives. Finally we certify the above information is correct and agree to the terms outlined.

____
Signature of Principal or Authorized Representative

Title: __________

Date: __________

Return Application To:
Children's Educational Opportunity Foundation
P.O. Box 17447
San Antonio, Texas 78217
(512) 829-0305

An Educational Initiative of the Texas Public Policy Foundation

To be completed by CEO Foundation Office.

Total Tuition Commitment from Foundation: $ __________

# of Payments: __________ Amount of each payment: $ __________

Due Dates: __________

Application is:
Approved: ☐
Not Approved: ☐

Federal School Lunch Program

INCOME ELIGIBILITY GUIDELINES

(Effective from July 1, 1991, to June 30, 1992)

For the 48 contiguous United States, District of Columbia, Guam, and territories.

Your family qualifies for the "free" or "reduced price" lunch program if:

The Total Number of People In Your Household Is:	And Your Total Family Income Is Less Than:		
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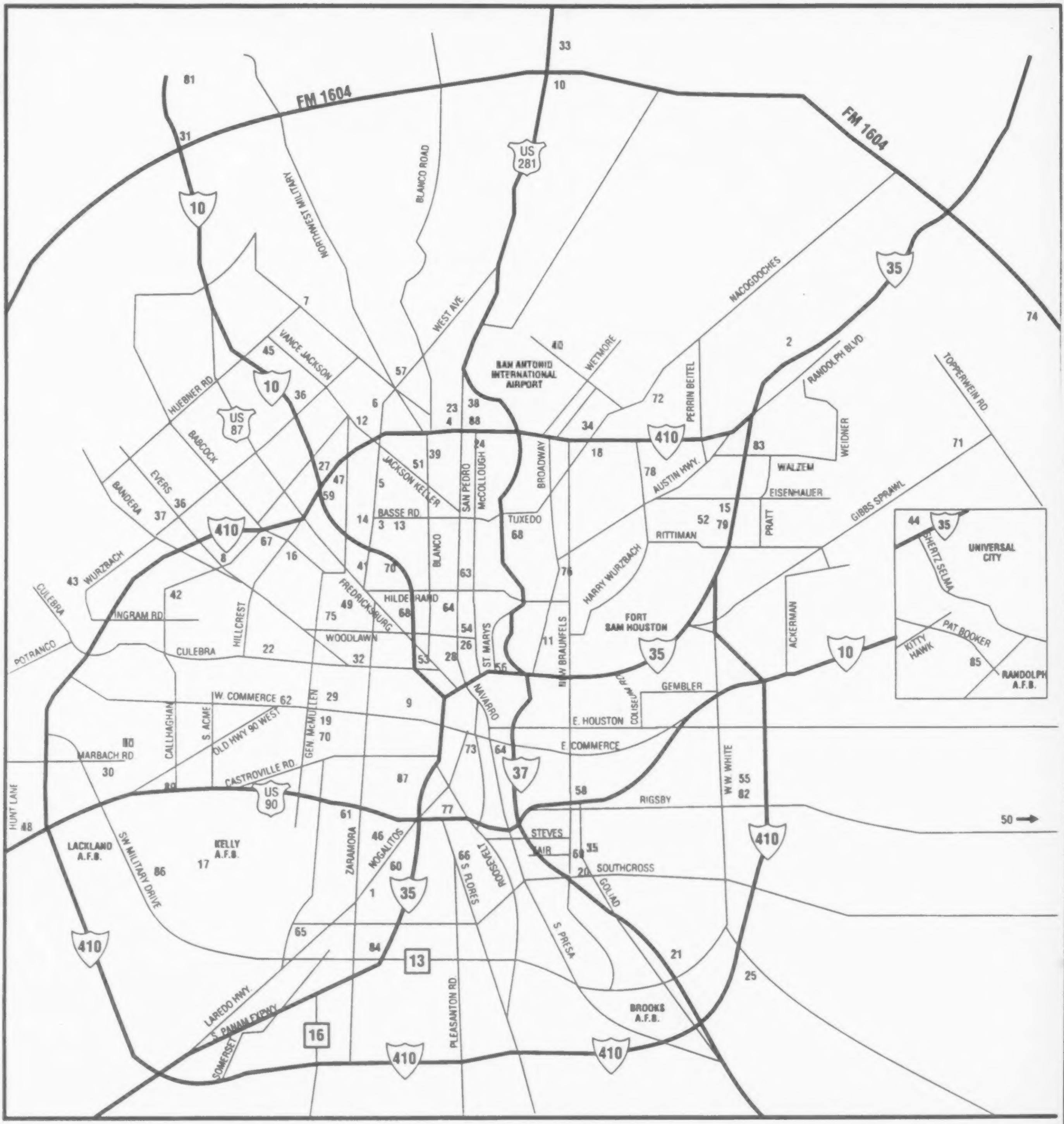
1	$12,247	$1,021	$236
2	16,428	1,369	316
3	20,609	1,718	397
4	24,790	2,066	477
5	28,971	2,415	558
6	33,152	2,763	638
7	37,333	3,112	718
8	41,514	3,460	798
For each additional family member add:	4,181	349	81

BEXAR COUNTY NONPUBLIC/PRIVATE SCHOOLS


FM 1604
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BABCOCK
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INGRAM RD
HILLCREST
WOODLAWN
FREDERICKSBURG
JACKSON KELLER
BASSE RD
BLANCO
HILDEBRAND
SAN PEDRO
McCOLLOUGH
ST MARYS
NAVARRO
BROADWAY
TUXEDO
NEW BRAUNFELS
HARRY WURZBACH
WETMORE
SAN ANTONIO INTERNATIONAL AIRPORT
NACOGDOCHES
PERRIN BEITEL
AUSTIN HWY.
RITTIMAN
EISENHAUER
WALZEM
PRATT
WEIDNER
RANDOLPH BLVD
TOPPERWEIN RD
GIBBS SPRAWL
ACKERMAN
FORT SAM HOUSTON
GEMBLER
COLISEUM RD
E. HOUSTON
E. COMMERCE
W. COMMERCE
OLD HWY 90 WEST
S. ACME
CALLAGHAN
GEN. McMULLEN
MARBACH RD
CASTROVILLE RD
HUNT LANE
LACKLAND A.F.B.
KELLY A.F.B.
SW MILITARY DRIVE
ZARAMORA
NOGALITOS
S FLORES
ROOSEVELT
STEVES
FAIR
SOUTHCROSS
GOLIAD
S PRESA
RIGSBY
W.W. WHITE
PLEASANTON RD
LAREDO HWY
S. PANAM EXPWY
SOMERSET
BROOKS A.F.B.
UNIVERSAL CITY
SCHERTZ SELMA
PAT BOOKER
KITTY HAWK
RANDOLPH A.F.B.
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CEO FOUNDATION
PRIVATE SCHOOLS IN SAN ANTONIO AND/OR BEXAR COUNTY

MAP#	SCHOOL SCHOOL DESCRIPTION	ADDRESS CITY	ST	ZIP	PHONE
26	Keystone School *Talented K to 12th*	119 East Craig Place San Antonio	TX	78212	(512) 735-4022
27	King's Academy *K thru 12*	8635 Callaghan Road San Antonio	TX	78230	(512) 349-2321
28	Kriterion A Montessor School *PreK to 8th*	611 Ashby San Antonio	TX	78212	(512) 735-9778
29	Lakeview Baptist School *K thru 8th*	4015 West Martin Street San Antonio	TX	78207	(512) 434-5944
30	Liberty Christian Academy *K thru 12*	7421 Marbach Road San Antonio	TX	78227	(512) 673-7740
31	Lighthouse Christian School *K thru 10*	21691 Milsa Lane San Antonio	TX	78256	(512) 698-2304
32	Little Flower School *PreK to 8th*	905 Kentucky San Antonio	TX	78209	(512) 732-9207
33	Living Faith Academy *PreK thru 12*	18850 Red Land Road San Antonio	TX	78259	(512) 490-3355
34	MacArthur Park Lutheran School *Pre to 3rd*	2903 Nacogdoches Road San Antonio	TX	78209	(512) 822-5374
35	Maranatha Adventist School *1st to 8th*	2526 Goliad Road San Antonio	TX	78223	(512) 333-8861
36	Montessor Schl. Childrens House *PreK to 8th*	4927 Evers Rd. San Antonio	TX	78247	(512) 436-0397
37	Montessori School International *18 mos to 10 years*	5309 Wurzbach Rd. San Antonio	TX	78238	(512) 647-4222
38	Montessori-Judson School *Pre to Middle School*	705 Trafalgar San Antonio	TX	78216	(512) 344-3117
39	Mount Sacred Heart School *K to 8th*	619 Mt. Sacred Heart San Antonio	TX	78216	(512) 342-6711
40	New Horizons School *K to 2nd*	3700 Ridge Country San Antonio	TX	78247	(512) 494-7022
41	Northside Baptist School *K to 2nd*	1407 West Avenue San Antonio	TX	78201	(512) 733-8281
42	Northwest Hills Christian Acdmy *K thru 12*	5914 Silvercrest Drive San Antonio	TX	78228	(512) 431-8809
43	Northwest Hills Christian Schl. *Pre thru 6th*	6585 Heath Road San Antonio	TX	78250	(512) 522-1102
44	Our Lady of Perpetual Help *K to 8th*	1607 N. Evans Rd. Selma	TX	78233	(512) 651-6811
45	Our Savior EV Lutheran School *K to 6th*	11503 Vance Jackson San Antonio	TX	78230	(512) 696-2716
46	Palm Heights Baptist School *PreK to 6th*	1106 West Malone San Antonio	TX	78225	(512) 923-8600
47	Pilgrim Congregational School *Infant to 1st*	500 Pilgrim San Antonio	TX	78213	(512) 344-4579
48	Rainbow Hills Baptist School *Pre K thru 12*	2255 Horal Dr. San Antonio	TX	78227	(512) 674-0490
49	Redeemer Lutheran School *Pre thru 8th*	2507 Fredericksburg Road San Antonio	TX	78201	(512) 735-9903
50	Salem Sayers Baptist Church Sch *PreK to 5th*	5212 FM 1628 San Antonio	TX	78263	(512) 649-1178

CEO FOUNDATION
PRIVATE SCHOOLS IN SAN ANTONIO AND/OR BEXAR COUNTY

MAP#	SCHOOL SCHOOL DESCRIPTION	ADDRESS CITY	ST	ZIP	PHONE
1	Beautiful Gate Baptist School *K thru 12*	539 Carlisle Avenue San Antonio	TX	78225	(512) 922-9795
2	Believers Academy *Kthru 12*	13714 Lookout Road San Antonio	TX	78233	(512) 656-2999
3	Bethesda Christian Institute *K to 8th*	2210 Basse Road San Antonio	TX	78213	(512) 341-2425
4	Blessed Hope Academy *3rd to 6th*	9123 Lorene Lane San Antonio	TX	78216	(512) 340-7620
5	Blessed Sacrament Parish Schl. *K to 8th*	600 Oblate San Antonio	TX	78216	(512) 824-3381
6	Castle Hills First Baptist *PreK thru 12*	2220 Northwest Military H San Antonio	TX	78213	(512) 377-8485
7	Child Montessori School *Pre K to 5th*	2829 Hunters Green San Antonio	TX	78231	(512) 493-6550
8	Childrens House/Montessori Schl *PreK to 8th*	4927 Evers San Antonio	TX	78228	(512) 436-0397
9	Christ the King School *PreK to 8th*	2626 Perez Street San Antonio	TX	78207	(512) 432-7651
10	Christian Heritage Schools Inc. *PreK to 8th*	16316 San Pedro Avenue San Antonio	TX	78232	(512) 496-1644
11	Circle School *PreK to 5th*	217 Pershing Avenue San Antonio	TX	78209	(512) 822-0461
12	Colonial Hills United Methodist *Pre to 1st grade*	5247 Vance Jackson San Antonio	TX	78230	(512) 349-1092
13	Concordia Lutheran Church *Pre to 5th*	1826 Basse Road San Antonio	TX	78213	(512) 733-7755
14	Discovery School *Pre K to 1st*	222 Salem Drive San Antonio	TX	78201-2230	(512) 344-3472
15	Eisenhauer Road Baptist Church *3 yrs to 2nd grade*	3950 Eisenhauer Road San Antonio	TX	78218	(512) 655-6831
16	Faith Outreach Christian Acadmy *K thru 12*	3806 Sunshine Ranch Road San Antonio	TX	78228	(512) 734-5034
17	Gateway Christian School *K thru 12*	6623 Five Palms Drive San Antonio	TX	78228	(512) 674-5703
18	Green Gateways School *2-1/2 yrs to 9 yrs*	2120 Nacogdoches San Antonio	TX	78209	(512) 824-8692
19	Herry Jersig Center *Our Lady of Lake U.*	411 S.W. 24 San Antonio	TX	78207	(512) 434-6711
20	Highland Hills Baptist School *3 yrs to 5th*	2751 East Southcross San Antonio	TX	78223	(512) 534-7441
21	Holy Name School *K to 8th*	3814 Nash San Antonio	TX	78223	(512) 333-5020
22	Holy Rosary School *PreK to 8th*	159 Camino Santa Maria San Antonio	TX	78228	(512) 433-4312
23	Holy Spirit Catholic School *K to 8th*	758 W. Ramsey San Antonio	TX	78216	(512) 349-1169
24	Jonathan Academy *K to 5th*	103 East Rampart Drive San Antonio	TX	78216	(512) 341-0735
25	Jubilee Outreach *K thru 12*	4434 Roland Avenue San Antonio	TX	78222	(513) 333-6227

CEO FOUNDATION
PRIVATE SCHOOLS IN SAN ANTONIO AND/OR BEXAR COUNTY

MAP#	SCHOOL SCHOOL DESCRIPTION	ADDRESS CITY	ST	ZIP	PHONE
26	Keystone School *Talented K to 12th*	119 East Craig Place San Antonio	TX	78212	(512) 735-4022
27	King's Academy *K thru 12*	8635 Callaghan Road San Antonio	TX	78230	(512) 349-2321
28	Kriterion A Montessor School *PreK to 8th*	611 Ashby San Antonio	TX	78212	(512) 735-9778
29	Lakeview Baptist School *K thru 8th*	4015 West Martin Street San Antonio	TX	78207	(512) 434-5944
30	Liberty Christian Academy *K thru 12*	7421 Marbach Road San Antonio	TX	78227	(512) 673-7740
31	Lighthouse Christian School *K thru 10*	21691 Milsa Lane San Antonio	TX	78256	(512) 698-2304
32	Little Flower School *PreK to 8th*	905 Kentucky San Antonio	TX	78209	(512) 732-9207
33	Living Faith Academy *PreK thru 12*	18850 Red Land Road San Antonio	TX	78259	(512) 490-3355
34	MacArthur Park Lutheran School *Pre to 3rd*	2903 Nacogdoches Road San Antonio	TX	78209	(512) 822-5374
35	Maranatha Adventist School *1st to 8th*	2526 Goliad Road San Antonio	TX	78223	(512) 333-8861
36	Montessor Schl. Childrens House *PreK to 8th*	4927 Evers Rd. San Antonio	TX	78247	(512) 436-0397
37	Montessori School International *18 mos to 10 years*	5309 Wurzbach Rd. San Antonio	TX	78238	(512) 647-4222
38	Montessori-Judson School *Pre to Middle School*	705 Trafalgar San Antonio	TX	78216	(512) 344-3117
39	Mount Sacred Heart School *K to 8th*	619 Mt. Sacred Heart San Antonio	TX	78216	(512) 342-6711
40	New Horizons School *K to 2nd*	3700 Ridge Country San Antonio	TX	78247	(512) 494-7022
41	Northside Baptist School *K to 2nd*	1407 West Avenue San Antonio	TX	78201	(512) 733-8281
42	Northwest Hills Christian Acdmy *K thru 12*	5914 Silvercrest Drive San Antonio	TX	78228	(512) 431-8809
43	Northwest Hills Christian Schl. *Pre thru 6th*	6585 Heath Road San Antonio	TX	78250	(512) 522-1102
44	Our Lady of Perpetual Help *K to 8th*	1607 N. Evans Rd. Selma	TX	78233	(512) 651-6811
45	Our Savior EV Lutheran School *K to 6th*	11503 Vance Jackson San Antonio	TX	78230	(512) 696-2716
46	Palm Heights Baptist School *PreK to 6th*	1106 West Malone San Antonio	TX	78225	(512) 923-8600
47	Pilgrim Congregational School *Infant to 1st*	500 Pilgrim San Antonio	TX	78213	(512) 344-4579
48	Rainbow Hills Baptist School *Pre K thru 12*	2255 Horal Dr. San Antonio	TX	78227	(512) 674-0490
49	Redeemer Lutheran School *Pre thru 8th*	2507 Fredericksburg Road San Antonio	TX	78201	(512) 735-9903
50	Salem Sayers Baptist Church Sch *PreK to 5th*	5212 FM 1628 San Antonio	TX	78263	(512) 649-1178

CEO FOUNDATION
PRIVATE SCHOOLS IN SAN ANTONIO AND/OR BEXAR COUNTY

MAP#	SCHOOL SCHOOL DESCRIPTION	ADDRESS CITY	ST	ZIP	PHONE
51	San Antonio Christian School *PreK thru 12*	5703 Blanco Road San Antonio	TX	78216	(512) 340-1864
52	Seventh-Day Adventists Jr. *1st to 10th*	1250 Holbrook San Antonio	TX	78218	(512) 655-5811
53	St. Ann's School *PreK to 8th*	210 St. Ann San Antonio	TX	78201	(512) 735-3241
54	St. Anthony School *PreK to 8th*	205 W. Huisache San Antonio	TX	78212	(512) 732-8801
55	St. Benedict's School *PreK to 8th*	4547 Lord San Antonio	TX	78220	(512) 648-1611
56	St. Cecilia's School *K to 8th*	118 Lowell San Antonio	TX	78210	(512) 534-2711
57	St. George Episcopal School *PreK to 8th*	6904 West Avenue San Antonio	TX	78213	(512) 342-4263
58	St. Gerard's School *Pre K to 8th*	1609 Iowa San Antonio	TX	78203	(512) 533-9541
59	St. Gregory The Great School *PreK to 8th*	700 Dewhurst San Antonio	TX	78213	(512) 342-0281
60	St. James School *PreK to 8*	907 W. Theo San Antonio	TX	78225	(512) 924-1201
61	St. John Berchmans School *K to 8th*	1147 Cupples Rd. San Antonio	TX	78226	(512) 433-0411
62	St. John Bosco School *Pre K to 8th*	5630 W. Commerce San Antonio	TX	78219	(512) 432-8011
63	St. John's Catholic School *K to 8th*	128 Audubon San Antonio	TX	78212	(512) 735-3526
64	St. John's Lutheran School *K to 1st*	502 E. Nueva San Antonio	TX	78212	(512) 225-2392
65	St. Joseph Catholic School *Pre K to 8th*	2372 W. Southcross San Antonio	TX	78211	(512) 922-0193
66	St. Leo's School *PreK to 8th*	119 Octavia Place San Antonio	TX	78214	(512) 532-3166
67	St. Luke Catholic School *K to 8th*	4603 Manitou Dr. San Antonio	TX	78228	(512) 434-2011
68	St. Luke Episcopal School *PreK to 6th*	11 St. Luke's Lane San Antonio	TX	78209	(512) 826-0664
69	St. Margaret Mary's School *K to 8th*	1202 Fair San Antonio	TX	78223	(512) 534-6137
70	St. Martin Hall *PreK to 8th*	411 Southwest 24th Street San Antonio	TX	78207	(512) 434-6711
71	St. Mary Magdelen School *PreK to 8th*	1700 Clower San Antonio	TX	78201	(512) 735-1381
72	St. Mary's Hall *PreK to 12*	9401 Starcrest Drive San Antonio	TX	78217	(512) 655-7721
73	St. Mary's School *K to 8th*	207 N. St. Mary's San Antonio	TX	78205	(512) 223-8581
74	St. Monica's School *K to 8th*	515 North St. San Antonio	TX	78109	(512) 658-6701
75	St. Paul's Catholic School *K to 8th*	307 John Adams San Antonio	TX	78228	(512) 732-2741

CEO FOUNDATION
PRIVATE SCHOOLS IN SAN ANTONIO AND/OR BEXAR COUNTY

MAP#	SCHOOL SCHOOL DESCRIPTION	ADDRESS CITY	ST	ZIP	PHONE
76	St. Peter Prince of Apostles *PreK to 8th*	112 Marcia Place San Antonio	TX	78209	(512) 824-3171
77	St. Phillip of Jesus School *PreK to 8th*	138 E. Lambert San Antonio	TX	78204	(512) 222-2872
78	St. Pius X School *PreK to 8th*	7734 Robin Rest Dr. San Antonio	TX	78209	(512) 824-6431
79	St. Thomas Moore School *K to 8th*	4411 Moana San Antonio	TX	78218	(512) 655-5070
80	Sunnybrook Christian Academy *PreK thru 12*	1620 Pinn San Antonio	TX	78227	(512) 674-8000
81	TMI *6th thru 12th*	20955 Tejas Trail West San Antonio	TX	78257	(512) 698-7171
82	Town East Christian School *K thru 12*	2030 Bible Street San Antonio	TX	78220	(512) 648-2601
83	Trinity Education Center *Pre to 8th*	8762 Four Winds Drive San Antonio	TX	78239	(512) 653-2800
84	Truth Christian Academy *K thru 12*	718 W. Pyron San Antonio	TX	78214	(512) 923-2209
85	Universal City Christian Acdmy *PreK to 6th*	1401 Pat Booker Raod Universal City	TX	78148	(512) 658-5331
86	Valley-Hi Church of Nazarene *K thru 8th*	5834 Ray Ellison Boulevar San Antonio	TX	78242	(512) 623-4504
87	Westside Catholic School *K to 8th*	314 Merida St. San Antonio	TX	78207	(512) 224-2450
88	Winston School San Antonio *1st thru 12th*	703 Trafalgar Road San Antonio	TX	78216	(512) 342-5345
89	New Life Christian Academy *PreK to 6th*	6610 Highway 90 West San Antonio	TX	78227	(512) 679-6050

PAVE

PARTNERS · ADVANCING · VALUES · IN · EDUCATION

MISSION

PAVE is an independent, nonprofit organization
established by volunteer leaders
to promote greater understanding and financial
support for academically excellent,
community-centered educational opportunities
whose values are consistent with the
Jewish-Christian tradition of education in America.

Discussions about education depend on an understanding of core values. PAVE believes the following statements incorporate the highest values of the Jewish-Christian tradition:

- Spiritual and moral formation are essential parts of education, especially in the early years of school.
- Parents are the primary educators of their children, and collaborate with a school in the formation of a student's intellect and character.
- All families, regardless of economic circumstances, deserve equal access to educational opportunities for their children in grades K-12.
- Expanding the range of alternatives for educating children, and the resulting competition among schools, will improve the quality educational offerings for all families.
- Effective site-based management ensures that financial resources are maximized in the classroom.
- It is sound public policy to support private educational alternatives both to save public funds and to uphold the constitutional rights of free exercise of religion and freedom of speech.

3501 South Lake Drive · P.O. Box 07912 · Milwaukee, Wisconsin 53207-0912
Phone 414-747-1505 Fax 414-769-3408

PAVE
PARTNERS · ADVANCING · VALUES · IN · EDUCATION

QUESTIONS AND ANSWERS

ABOUT

THE PARTNERSHIP FOR EDUCATIONAL CHOICE

Q. What is the purpose of The Partnership for Educational Choice?

A. The Partnership for Educational Choice, sponsored by Partners Advancing Values in Education (PAVE), aims to help low-income families with children in grades K - 8 offset the cost of tuition at the private school of their choice, through a simple program of tuition assistance. We believe that all families, regardless of economic circumstance, deserve equal access to educational opportunities for their children. We also believe that parents are the primary educators of their children, who deserve -- and are capable of exercising -- full and free choice among the broadest possible range of educational alternatives.

Currently, low-income families enjoy few educational alternatives. With limited resources, most of them must settle for whatever is offered solely within the public school system. A few children are able to attend a handful of strictly non-sectarian schools, through the Milwaukee Parental Choice program. The Partnership, by contrast, will give low-income parents the same option available to well-to-do parents, namely, to choose the school they believe will best educate their children from the full range of public and private alternatives.

Q. How do children qualify for tuition assistance in this program?

A. There are only two criteria:

1. The child must live within the Milwaukee Public School District.
2. The child must qualify for the free or reduced lunch program.

Tuition assistance through the Partnership will be available to all students, regardless of race, religion or academic background.

Q. How can parents find out whether their child qualifies for the lunch program, and thus for tuition assistance?

A. They can check the "Income Eligibility Guidelines" sheet in the information packet. The principal at the private school to which they apply will also be helpful in answering questions about eligibility.

Q. Are grades important for getting into the program?

A. This program provides tuition assistance based on need, rather than on academic achievement. Indeed, it's quite possible that parents of students who have been struggling academically in the public system will be the ones most eager to try an alternative approach to education. Because private contributions may not be able to assist all who wish to apply, this program is strictly first-come, first-served.

Q. How large a subsidy is your program offering?

A. Our program will contribute one-half the tuition of a child in grades K - 8 up to $1,000. If the tuition is $1,600, we will pay $800. If it is $2,000, we will contribute $1,000. If tuition is $2,400, we still pay the maximum of $1,000. Parents receiving tuition assistance from public sources -- for instance, from the Milwaukee Parental Choice Program -- are not eligible for further assistance from the Partnership. Parents may, however, receive assistance from other private sources and remain eligible for our program. Other policy decisions affecting the student's financial relationship with the school -- eligibility of currently enrolled students for grants, parent financial support, and other such issues -- are best addressed by each participating school and parent.

Q. Why don't you simply offer to pay the full tuition costs?

A. First, we believe that it's important to open the door of opportunity to as many families as possible, as quickly as possible. Our current approach allows us to use necessarily limited resources to provide significant assistance to a broader range of families. Second, and far more important, we regard tuition assistance as a helping hand, not a hand-out. We want families to have a tangible stake in this important educational endeavor. This makes more likely their intense involvement in the education of their children. They will have such a stake, if they are contributing to the cost of schooling.

Q. How do families obtain the necessary forms and further information about the program?

A. Simple, brief, straightforward application forms and information sheets are available at conveniently located neighborhood centers and public libraries throughout Milwaukee. Information and applications are also available at neighborhood private and parochial schools in the city of Milwaukee. In addition, PAVE maintains a dedicated phone line (747-1505) for parents and others seeking further information about our program.

Q. What schools may eligible parents select for their children?

A. Parents may use our tuition assistance to offset costs at non-public schools, grades K - 8, throughout the City of Milwaukee. Our information packet includes a list of those schools. As you can see, low-income parents will now be better able to approach a vast range of schools which may previously have been out of their reach for financial reasons, including religious institutions such as Catholic, Lutheran, Baptist, AME, and Jewish schools, as well as an array of non-sectarian institutions.

The schools participating are expected to maintain standards of excellence, and to meet the following criteria:

-- Open enrollment and non-discriminatory policies.

-- A commitment to values-based curriculum for children in kindergarten through 8th grade.

-- A commitment to educating students from diverse cultural backgrounds.

-- A commitment to involving parents in the life of the school, recognizing the parents' role as primary educators of their children.

-- Sound governance and fiscal management.

Qualifying for tuition assistance does not guarantee admission to any one of these schools, which will apply their customary guidelines for enrollment. Our tuition assistance, however, should help parents overcome financial barriers that may have restricted access before.

Q. What do you mean when you say that parents are the "primary educators" of their children?

A. The decision about which school or which approach to education is best for a child is, indeed, a momentous one. That's why we prefer to put that decision in the hands of the parents -- those who know the child best, and who, in virtually every other aspect of life, are considered competent to make decisions of great import to the child's future. Only recently have we seen the development of the peculiar notion that such decisions should be left to "experts" -- largely administrative bureaucrats, with no knowledge of, or immediate interest in, a particular child.

We are doing everything we can to facilitate wise choice on the part of the parents. Our forms are brief, straightforward, and uncomplicated -- unlike most of the paperwork involved in typical encounters with educational programs. And we are making appropriate information available, in several languages, at easily accessible locations for the parents.

No one appreciates the gravity of school choice more than the parents themselves. That is, in fact, why parental choice is such an important element in successful schooling for children. Parents who are permitted to select a school for their children develop a greater stake in the educational process. They enter into the life of the school they have selected, becoming more involved in its programs, its administration, and its fundraising. They are more attentive to the critical part of learning that goes on at home, keeping the child focused on homework and other constructive activities. Research on "effective schools" tells us that this sort of parental commitment is essential to successful education. And it begins with school choice.

That's why Howard Fuller, Superintendent of the Milwaukee Public Schools, considered "expanding parental options" one of three essential strategies for improving student performance, in his reform plan "Strategies for Change." As he put it, "parents will be more involved in their children's education if they choose the schools their children attend, and if those schools are accessible."

Nonetheless, some people today harbor the belief that parents -- especially low-income parents -- are incapable of making thoughtful decisions about their children's education. We find that view to be both condescending and demeaning. The American way of life is rooted in the belief that the free individual is the most capable judge of what is best for him or her. Our democratic political system reflects that belief, with the most important decisions made by individuals balloting in free and open elections. Our economic system reflects that belief, with the free marketplace responding to the demand of the consumer. In the realm of education, however, we suddenly encounter the presumption that individuals cannot be trusted to make important decisions -- or rather, that only well-to-do families should be allowed educational choices. That view not only discriminates against and insults low-income families -- it also offends deeply our most cherished political commitments. Our tuition assistance plan, by contrast, respects the equal dignity of all individuals -- including those who may not earn as much as others -- and seeks to bring alive for all Milwaukeans democracy's promise of an equal start in life, based on faith in individual choice.

Q. Aren't you in danger of losing accountability when you move away from a strictly government-run system?

A. Accountability can mean one of two things. One idea of accountability is that it must run upward, through ever higher levels of centralized, bureaucratic management. Another idea of accountability is that it should run downward, to the individual consumer involved. As noted, America is built on the assumption that the best, most democratic institutions are those that are accountable to the individuals they serve. Our tuition assistance plan reflects this belief. A genuinely accountable educational system is one that responds most immediately to the parents themselves, not to distant, centralized bureaucracies. But accountability to parents is possible only if they have an option to leave an otherwise rigid and unresponsive system. That option is what our tuition assistance will provide low-income parents.

Q. Won't this system simply "cream" the best students from the public schools -- that is, encourage only the academically gifted to leave the system?

A. Our tuition assistance plan is not based on academic performance -- only on financial need. Our assumption is that all parents, not just those whose children may be gifted, are equally eager to secure the best education for their children, and so will consider taking advantage of tuition assistance. In fact, it may well be that parents of students who are doing well in public schools will be least, not most, likely to consider taking them elsewhere. Conversely, parents whose children are struggling in public school may well be the ones most likely to seek an alternative in the private sphere. This likelihood is increased by evidence that students written off by the public schools as "incorrigible" or "uneducable" often do quite well in the more rigorously structured environments of private schools.

Q. Doesn't this program compete for resources needed to bring reform to public schools?

A. Funding for our program of tuition assistance comes strictly from the private sector -- foundations, corporations, and individuals. Thus, MPS will lose none of its public funding. Indeed, with some students leaving the public system to take advantage of private schooling, MPS's resources will now be focused on fewer students.

To be sure, the public school system will now face competition for students. But Americans have always understood that competition is beneficial. It makes our institutions -- whether economic, political, or educational -- more responsive, more flexible, more economical, with leaner management structures. By contrast, monopolies -- in any field -- tend to be unresponsive, inflexible, and costly, with bloated, inefficient, bureaucratic management. If competition can help to alleviate some of these problems at MPS, what some describe as "damage" might better be viewed as "reform."

Indeed, the need for reform is clear to all, for an extraordinarily high number of students are already exiting the MPS system -- as drop-outs. Some suggest that we should wait patiently for the public school system to reform itself. Our current Superintendent was hired to commence such reform, and he has made diligent efforts to do so. It appears, unfortunately, that further delays are in store. Perhaps advocates of genuine reform within MPS will now be able to point to our tuition assistance program as another reason for urgency in undertaking internal changes, in order to make MPS more competitive with the private sector.

At any rate, it is simply unacceptable that Milwaukee's inner city parents and children should continue to be held hostage to the uncertain prospect of future internal reform. While various powerful factors serve to delay that reform and to maintain the status quo, another generation of Milwaukee's children is being lost to illiteracy, poverty, and despair. It is time to set these parents and children free -- through school choice.

Q. Doesn't Milwaukee already have a system of school choice?

A. The "Milwaukee School Parent Choice" program is by no means a full-fledged system of choice. Under the current program, a small number of qualifying parents are permitted to choose among a mere handful of schools in the city. Most important, the schools open to parents in the existing system must be non-sectarian -- that is, no religious schools are included. Because our tuition assistance program is funded strictly by the private sector, parents may select among religious or parochial schools as well as non-sectarian institutions. No objection may be raised by those who maintain that public funds cannot constitutionally be used to subsidize tuition at sectarian institutions.

Q. Why is it so important to include church-sponsored schools?

A. Many parents prefer to send their children to a school that reflects and reinforces strong religious or moral values. For some parents, this is a way of passing on to their children the beliefs and commitments they believe to be most important. In a free society, this is a right that all citizens should enjoy. Today, however, only wealthier parents enjoy this right. Our tuition plan makes this right available to low-income parents as well.

Other parents have concluded that their children can learn more readily in schools that are rigorously structured, with a firm emphasis on discipline, self-control, and responsibility. Those parents correctly believe that church-sponsored schools offer precisely that sort of environment, while public schools can no longer guarantee even the physical safety of their children, much less an orderly environment for learning. (This is, no doubt, why some 66% of the enrollment in Milwaukee's Catholic inner city schools is non-Catholic). Research on "effective schools" confirms parental convictions that orderly, disciplined school environments enhance the process of learning.

For many inner-city parents, the right to choose this sort of school may be particularly important. In the midst of broken families and decaying neighborhoods, an orderly, structured school inculcating values like self-discipline and responsibility may be the sole island of stability and support for children, and the sole means by which they absorb the values essential for escaping inner-city poverty. Our tuition assistance program makes that escape more likely.

Q. What makes you think that the schools involved in the Partnership program will do a better job of educating children?

A. We have learned a great deal over the past several decades about what makes some schools better than others, through research into what are called "effective schools." Dianne Ravitch, Deputy Secretary of the U.S. Department of Education, noted that effective schools are those with "an outstanding principal, high expectations for all children, an orderly atmosphere, a regular testing program, and an emphasis on academic learning." Such schools, of course, can and do exist in the public as well as private sector. Other research, however -- especially a landmark report released in 1981 by renowned education expert James Coleman -- tells us that private and parochial schools are more likely than public schools to provide the elements essential to effective education. In such schools, the academic performance of children from low-income households is notably better than in public schools.

Milwaukee parents already understand this, which is why, as noted, some 66% of students in inner-city Catholic schools come from non-Catholic households. Clearly, those parents are drawn to what they understand to be "effective schools," where order and discipline are maintained, and where academic achievement is expected and demanded from all. The fact that they themselves have selected the school enhances the likelihood that they will be intensely engaged in their children's schooling, which is another vital component of good education. Our goal is to enable all low-income Milwaukee families freely to choose such effective schools for their children.

Q. How will your program affect Milwaukee's neighborhood communities?

A. The most vital and enduring communities are created around shared beliefs and values, not around geographical boundaries. The life of Milwaukee has been vastly enriched by a tradition of strong, vibrant ethnic and religious communities, centered around such shared values. At the core of each such community -- whether Catholic, African Methodist-Episcopal, Lutheran, Baptist, or Jewish -- has been a school, in which parents' commitments and beliefs are passed on to their children. Without that school -- without the prospect that the community's values will be passed down to future generations -- a community is enfeebled, its prospects for survival diminished. Today, many such community-based schools face an uncertain future for reasons having nothing to do with the quality of education they provide, which is often superb. It is anticipated that our tuition assistance program will help strengthen Milwaukee's communities, by strengthening the schools through which they pass on their values to future generations. At the same time, it should be clear that our program is not designed to subsidize any particular school or kind of schools, but to subsidize parental freedom of choice for all low-income Milwaukeans.

Q. What about transportation for students involved in your program?

A. It is expected that parents will take into consideration the costs of transportation and the distance involved, when they choose the school they believe best for their children. Most parents prefer neighborhood schools for their children in grades K-8, and are likely to select a school that takes into account transportation needs.

Q. How about children with disabilities and other special needs?

A. Some private schools do provide programs for children with special needs. We believe that the parents of such children are fully capable of taking into consideration the quality of such programs, when they select a school. Furthermore, it should be noted that nothing in our program of tuition assistance in any way undermines the special needs programs of the public schools. In fact, with some children now able to enter private schools, public resources will have to meet the needs of fewer students. In light of this, public schools may wish to allocate more resources to their special needs children.

Q. What sort of backing does this program have? How can parents be sure that support will be available in the future?

Our program is backed by significant, multi-year commitments from a variety of leading Milwaukee corporations, foundations, and individuals. In addition, we will solicit the broader Milwaukee community for additional funding. Because our program is designed to benefit the parents themselves, rather than any particular type of school, we anticipate that additional contributions will be readily forthcoming from the full range of Milwaukee's business and civic institutions.

Our broader intention is to stimulate within our community a fundamental rethinking of the way we approach education -- the sorts of choices we believe that all parents deserve, and the way we finance those choices, with both public and private resources. Our goal is simple. We will not be satisfied until every family in Milwaukee has the opportunity to send its children to the school of its choice.

PAVE

PARTNERS · ADVANCING · VALUES · IN · EDUCATION

ATTENTION PARENTS!

Are your children enrolled in a school you feel is best for their overall education? If financial assistance were available, would you try to enroll your child in a private or parochial elementary (K-8) school of your choice in the City of Milwaukee?

If you live in the City of Milwaukee, and if you qualify for federal lunch programs, you may be eligible to participate in the **Partnership for Educational Choice.**

The goal of the Partnership is to expand educational opportunities for low-income families who would prefer the option of a private or parochial elementary school for their children. The Partnership is sponsored by Partners Advancing Values in Education (PAVE), a non-profit organization of volunteer leaders based in Milwaukee.

The Partnership will pay one half (1/2) of your child's yearly tuition, up to $1,000, to attend a private or parochial elementary school in Milwaukee. That means if the school's tuition is $800, the Partnership will pay $400. If the tuition is $2,400, the Partnership will pay $1,000.

You must visit the school of your choice to see if you qualify for the federal lunch programs. In general, a single parent with two children may qualify if the annual income does not exceed $21,000. A family with two parents and three children could make up to $30,000.

To participate in this program you need only do three things:

1.) Fill out the application on the other side of this form and take it to the school of your choice in Milwaukee.

2.) Enroll your child in the private or parochial elementary (K-8) school and have the school return the application form to PAVE.

3.) Pay your share of the tuition when it is due.

Participation in this tuition grant program is on a first-come, first-served basis. There are a limited number of tuition scholarships available, so sign up now!

(Complete application on the other side)

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PARTNERSHIP FOR EDUCATIONAL CHOICE

TUITION GRANT APPLICATION

NOTE: To qualify for grant, student must live within the City of Milwaukee.

1. Name of Student ______________________________

2. Name of parent or guardian ______________________________

3. Home address ______________________________
Street City State Zip Code

4. Home Phone ______________ Work Phone ______________
No Phone, but parent can be reached at ______________________________

5. School where student is enrolled *at present* ______________________________
Name of School

6. School where student *will enroll with grant* ______________________________
Name of School

7. Grade / semester that *student will enroll with grant* __________ / __________
(K-8) Semester (autumn or winter)

8. School tuition for 1992/93 year __________ Tuition grant (1/2 tuition) __________

PROOF OF ELIGIBILITY

________ My child qualifies for "free" or "reduced price" lunch program.

________ My financial obligations to the school have been discussed and are clearly understood and satisfactory.

________ My responsibilities as the primary educator of my child have been discussed with the school I've chosen, and I agree to abide by the guidelines of the school.

______________________ ______________________ __________

Signature of parent or guardian Relationship to child Date

________ My school will comply with the policies established by PAVE, and will provide documentation for evaluation or audit of the program.

______________________ ______________________ __________

Signature of principal or delegate School Date

PAVE

PARTNERS · ADVANCING · VALUES · IN · EDUCATION

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THE PARTNERSHIP FOR EDUCATIONAL CHOICE

Summary of Guidelines

June 4, 1992

1. In the first year of the Community/Student Partnership, PAVE will provide low-income families the opportunity to enroll their children in private or parochial elementary (K-8) schools in the City of Milwaukee.

2. Students participating in the State funded "Milwaukee School Choice Program" will not be eligible because the goal of the Partnership is to expand educational opportunities for low-income families.

3. The Partnership does not discriminate as to a student's race, religion or academic background; the only factors are financial need and the availability of spaces in an eligible school.

4. Investments for the Partnership Fund will be sought from foundations, corporations and selected individuals.

5. Grants equivalent to one-half (1/2) tuition, or a maximum of $1,000, will be made available to students whose families qualify for the federal subsidy lunch program. The grant will be paid in two installments (one half each semester), with a commitment for the full school year provided the student remains in good standing at an eligible school.

6. One half (1/2) of the grants will be reserved for students who are already enrolled in the eligible schools. The other 1/2 of the grants will be awarded to students not presently attending an eligible school.

7. The schools involved in the the Partnership accept responsibility for funding a major portion of the

3501 South Lake Drive · P.O. Box 07912 · Milwaukee, Wisconsin 53207-0912
Phone 414-747-1505 Fax 414-769-3408

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BUDGET SUMMARY
1992

EXPENSES		FUNDING TOTAL	FUNDING REQUESTED	RECEIVED
I.	Personnel			
	A. Salaries & Wages	$74,390		
	B. Fringe Benefits	15,060		
	Subtotals	$89,450	$76,450	$25,000
II.	Non-Personnel			
	A. Office Space & Building Services	$8,400		
	B. Purchase of Office Supplies (386SX-20 Computer, Laser Printer Word Perfect Software, Carpet & Painting for Office)	5,750		
	C. Consumable Supplies	1,200		
	D. Travel & Meetings	3,000		
	E. Telephone	1,800		
	F. Postage	1,200		
	G. Periodicals & Research Materials	500		
	Subtotals	$21,850	$13,450	$8,400
III.	Specific Project Costs			
	A. Public Awareness Campaign	15,000		
	B. Annual Evaluation	12,000		
IV.	Community/Student Partnership Grants (1,500 @ $1,000 per student)	$1,500,000		
	Subtotals	$1,527,000	$45,000	
	TOTALS	$1,638,300	$134,900	$33,400
INCOME				
I.	Archdiocese of Milwaukee	$33,300		$33,300
II.	Board Members' Contributions	20,000		20,000
III.	Start-up Grants from Foundations	85,000		25,000[1]
IV.	Corporate Partners	1,500,000		500,000[2]
		======		======
	TOTAL	$1,638,300		$578,300

Patrick and Anna M. Cudahy Foundation [1]
Lynde & Harry Bradley Foundation [2]

Community/Student Partnership grant goals 1993-1996

1993 = 1,000 students
1994 - 1,100 students
1995 - 1,200 students
1996 = 1,300 students

Children's Education Foundation

An Initiative of the Georgia
Public Policy Foundation

Instructions

Does your elementary-school child:

☐ Live within Fulton, Cobb, Gwinnett, DeKalb or Clayton Counties?
☐ Qualify for the "free" or "reduced price" lunch program at or below the levels in the chart below?

Income Eligibility Guidelines (1992 - 1993 school year)

Household Size	Annual	Income Month	Week
1	$12,247	$1,021	$236
2	16,428	1,369	316
3	20,609	1,718	397
4	24,790	2,066	477
5	28,971	2,415	558
6	33,152	2,763	638
7	37,333	3,112	718
8	41,514	3,460	798
For each additional family member add . . .	+4,181	+349	+81

Do you:

☐ Want to pick the school your child attends?
☐ Want some help paying the school tuition?

If you answered "yes" to each of those questions, then you'll like the **Children's Education Foundation (CEF)**. This new program will pay half of your child's yearly tuition (up to $3,000) to go to a private elementary school within the five-county Atlanta area (Fulton, DeKalb, Clayton, Gwinnett or Cobb).

That means that if the school's tuition is $2500, CEF will pay $1250. If the tuition is $4000, CEF will pay $2000. If it's $7500, then CEF will pay the maximum of $3000.

What do you have to do? Just three things:

1. Enroll your child in the school of your choice.

2. Fill out the enclosed application form and return it to the **Children's Education Foundation** by MAIL ONLY. CEF cannot accept hand delivered applications.

3. Pay your share of the tuition when it's due.

That's all there is to it! CEF will pay its share directly to the school.

Your child's past grades don't matter. This is first-come, first-served. There are a limited number of grants available, so don't wait. Sign up now! We've given you a choice. Now it's up to you.

BEST COPY AVAILABLE

CHILDREN'S EDUCATION FOUNDATION

Application Form

NOTE: ALL APPLICATIONS MUST BE COMPLETED ON AN ORIGINAL CEF APPLICATION FORM. COPIED APPLICATION FORMS WILL NOT BE ACCEPTED.

DRAFT

Date:

Student's name:

Date of birth:

Elementary school presently attending:

Present grade:

Private elementary school you would like your child to attend:

(school name)

(school address)

(The school can be located anywhere within the five counties listed above)

Parent or guardian's name:

Home address:

Home phone:

No phone, but can be reached at:

Child's address (if different):

(Parent or Guardian: Check Appropriate Boxes)

☐ My child qualifies for the "free" or "reduced price" lunch program.

☐ As this child's parent or guardian, I pledge to keep current on tuition and fee payment to the school my child attends. (Grant payments will continue as long as you stay current.)

Parent or guardian's signature:

Date:

Relationship to child:

CHILDREN'S EDUCATION FOUNDATION

School Application Form

For school's use only. To be completed by the Principal or other duly delegated school representative.

Please complete and sign the form.

☐ Our school is participating in the **Children's Education Foundation** (CEF).

☐ We acknowledge that CEF's continued payment is contingent on the parent or guardian remaining current on the fee and tuition payments to our school. We agree to monitor this situation and report the payment status of each grant recipient to CEF as a condition of receiving grant payments.

☐ This applicant, ____________________, qualifies for the "free lunch" or "reduced lunch" program and lives within one of the aforementioned five-counties. The applicant is thereby qualified to receive a CEF grant.

☐ We agree to maintain documentation of eligibility for free and reduced lunch for this grant recipient and to provide access to the documentation for audit purposes by CEF or its designated representatives if requested.

TUITION INFORMATION

The CEF will match its grant payment to the tuition payment plan selected by the parent or guardian. Payments are contingent on the parent or guardian remaining current on all tuition and fee obligations to the school.

Please provide the following

School tuition for 1992-1993 school year .... ____________

CEF grant (50% of tuition up to $3000 maximum) .... ____________

Parent or guardian's obligation (tuition less CEF grant) .... ____________

Amount of each tuition payment by parent or guardian .... ____________
(Parent obligation tuition divided by 10)

Amount of each grant payment by CEF .... ____________
(CEF obligation divided by 10)

Signature of Principal or Duly Authorized Delegate

Signature ______________________________ Date ______________________________

Print Name ______________________________ Title ______________________________

School ____

Address ____

Phone ____

PARENT OR SCHOOL MUST MAIL APPLICATION TO:

Children's Education Foundation
2900 Chamblee-Tucker Road, Bldg. 6
Atlanta, GA 30341-4128
(404) 455-6116

Investing in Children

Children's Education Foundation

The **Children's Education Foundation** is designed to give poor parents a full range of choices about their children's education. Modeled after the highly successful Choice Charitable Trust in Indianapolis, Indiana, the **Children's Education Foundation** is a privately funded program that will provide scholarships to low-income parents who wish to enroll their children in a non-public school. By assisting poor parents with private or parochial school tuition, the **Foundation** will equalize educational opportunity, offering low-income families an educational option otherwise denied them because of cost.

There is no single factor more important for personal advancement than a quality education. Yet, Georgia students are clearly being poorly served by our public education system.

- The United States Department of Education reports that black and hispanic children who have had the opportunity to attend private grade schools have a 37% better chance of graduating from college than white children attending public grade schools.
- Georgia SAT scores rank 20th of the 22 states in which the SAT is the dominant college admission exam.
- According to the 1991 National Education Goals Report, 85% of Georgia public school 8th-graders are NOT competent in mathematics for their grade level.
- Georgia public schools have one of the lowest rates in the nation of students graduating and going on to college.

An Education Initiative of the
Georgia Public Policy Foundation

More money for education is not the solution. Carver High School in Atlanta already spends nearly $11,000 per student, more than the cost of tuition at Morehouse College. Instead, we should return to poor parents the power to make fundamental decisions about their children's education.

In 1954, the U.S. Supreme Court, in *Brown v. Board of Education*, established a constitutional mandate for equality of educational opportunity. But today, sadly, we still have a two-tier education system. Our schools are no longer segregated by race, but by wealth. Those parents with enough money can move to the suburbs to a better school district. Others with money can even enroll their children in private or parochial schools. But, the poor are left behind, their children forced to remain in substandard schools -- separate and unequal.

Long-time Atlanta civil rights activist Louise Watley explains it this way: "My great grandfather was a slave. He didn't have any choice about his education. Today, my grandchildren don't have much more choice than he did."

The **Children's Education Foundation** has already raised more than $1 million toward its goal of $5 million. King & Spalding, one of Atlanta's most prestigious law firms, has agreed to provide *pro bono* legal services. The Georgia Public Policy Foundation, Inc. will fufill all administrative needs of the **Foundation**. One hundred percent of all funds donated to the **Foundation** will be given back to the community in scholarships.

The **Foundation** will be governed by a Board of Trustees whose make-up reflects the ethnic diversity represented in Atlanta. When announced publicly, on August 10, the Atlanta metro business community will be challenged to adopt 1,000 Atlanta area students each year, allowing them the very best opportunity in education that Atlanta has to offer.

Children's Education Foundation
2900 Chamblee-Tucker Road • Building Six
Atlanta, Georgia 30341-4128
Telephone (404) 455-6116

QUESTIONS AND ANSWERS ABOUT THE CHILDREN'S EDUCATION FOUNDATION

What is the purpose of the Children's Education Foundation?

The goal of the Children's Education Foundation (CEF) is to help provide low-income families with a full range of educational options. The crisis in our schools is particularly threatening for the poor and disadvantaged in our society, because education is the surest route out of poverty and into the mainstream of our society. In 1954, the U.S. Supreme Court, in *Brown v. Board of Education,* established a constitutional mandate for equality of educational opportunity. But, today, sadly, we still have a two-tier education system. Our schools today are no longer segregated by race, but by wealth. Those parents with enough money can move to the suburbs to a better -- not good, but better -- school district. Others with money can even enroll their children in private schools. But, the poor and the middle class are left behind, their children forced to remain in substandard schools -- separate and unequal. By providing funds to assist poor families attend non-public schools, the Children's Education Foundation hopes to expand equality of opportunity in education.

Who is eligible to participate in the program?

Any child is eligible for the program if they meet three criteria:

1) The child must live within Fulton, DeKalb, Clayton, Gwinnett or Cobb Counties;

2) The child must qualify for the federal free or reduced-price lunch program; and

3) The child must have met all admission requirements at a participating school.

Eligible students will be accepted for the program on a first-come, first-served basis.

How much financial assistance will the program provide?

Parents will be provided with a voucher equal to one-half of the tuition of the school their child attends, up to a maximum of $3,000. For example, if a school's tuition is $2,500, the CEF will provide a voucher for $1,250. If the tuition is $4,000, we will pay $2,000. If the tuition is $7,500, we will pay the maximum of $3,000.

What if a family cannot afford the remaining tuition?

Most of the participating schools offer some financial assistance. In addition, in cases of extreme hardship, the CEF may provide additional assistance. However, the program is not designed as a hand-out, but a helping hand. We want families to participate in their child's education, to have a stake in the effort. We believe that family involvement is crucial to a child's education.

What happens next year? Is this only a one-year program?

The Children's Education Foundation is committed to at least a four year program. Children accepted for the program will be provided assistance for at least four years, provided they continue to meet the school's admission requirements.

What schools are participating?

The following schools have agreed to participate in the program:

- Epstein School
- Immaculate Heart of Mary School
- Cumberland Christian Academy
- Arbor Montessori School
- Mt. Vernon Christian School
- Lovett School
- Old National Christian Academy
- Lullwater School
- Galloway School
- Canterbury School
- Westminster School
- Perimeter Christian School
- Greater Atlanta Christian Schools
- Faith Lutheran School
- Yeshiva High School
- Christ the King School
- Woodward Academy
- Our Lady of Lourdes School
- Our Lady of the Assumption School
- St. Anthony School
- St. John the Evangalist School
- St. John Neumann Regional School
- St. Joseph School
- St. Jude the Apostle School
- Sts. Peter and Paul School
- St. Thomas More School
- Pace Academy
- Marist High School
- Walker School

Other schools may participate by calling the Children's Education Foundation.

Are there academic eligibility requirements?

There are no academic eligibility requirements beyond those required for admission to the participating schools. The program is not an academic scholarship, but a need-based grant.

How do parents apply?

Parents may receive an application by calling the Children's Education Foundation at 404-455-6116. Parents must complete their portion of the application and have the school complete its portion, then mail the completed application to the CEF. Applications will not be considered unless both the parent's and school's portions are completed. Applications must be delivered by mail. Hand-delivered applications will not be accepted.

Children will be accepted on a first-come, first-served basis. Children not accepted will be placed on a waiting list in the order that applications are received.

Who supports the Children's Education Foundation?

The Children's Education Foundation is a privately funded, tax exempt organization and is classified as a Section 501(c)(3) organization under the Internal Revenue Code of 1954. The Foundation is supported by voluntary tax-deductible contributions from individuals, foundations, associations and corporations. The Children's Education Foundation is a project of the Georgia Public Policy Foundation.

Children's Education Foundation
2900 Chamblee-Tucker Road • Building Six
Atlanta, Georgia 30341-4128
Telephone (404) 455-6116

Children's Education Foundation

PARTICIPATING SCHOOLS

Arbor Montessori School
2998 LaVista Road
Decatur, GA 30033

Phone: 321-9304
Grades: K-6
Tuition: K-3 $4,370
4-6 $4,600 - $4,750

Religious affiliation: NONE
Additional financial aid available:
extensive need-based financial assistance.

NOTE: This school follows the Montessori curriculum.

Canterbury School
604 Cooledge Avenue, NE
Atlanta, GA 30306

Phone: 876-5059
Grades: K-2
Tuition: $3,900

Religious affiliation: NONE
Additional financial aid available:
extensive need-based financial assistance.

Christ the King School
46 Peachtree Way, NE
Atlanta, GA 30305

Phone: 233-0383
Grades: K-8
Tuition: Catholic $2,267
Non-Catholic $4,670

Religious affiliation: Catholic
Additional financial aid available:
Yes, but limited

Cumberland Christian Academy
3050 Austell Road
Marietta, GA 30060

Phone: 434-5487
Grades: K-12
Tuition: $2,600

Religious affiliation:
No denomination, but Christian orientation
Additional financial aid available: NONE

Epstein School

335 Colewood Road
Atlanta, Ga 30328

Phone: 843-0111
Grades: 1-8
Tuition: $5,500

Religious affiliation:
Jewish (Conservative)
Additional financial aid available:
yes, but limited

Faith Lutheran School

2111 Lower Roswell Road, NE
Marietta, GA 30068

Phone: 973-8921
Grades: K-5
Tuition: $2,100

Religious affiliation:
Lutheran Church -- Missouri Synod
Additional financial aid available:
yes, but limited

Galloway School

215 West Wieuca Road, NE
Atlanta, GA 30342

Phone: 252-8389
Grades: K-12
Tuition: K-8 $6,355
9-12 $6,870

Religious affiliation: NONE
Additional financial aid available:
extensive need-based financial assistance.

Greater Atlanta Christian Schools (3 Campuses)

Arlington Campus
4500 Ridge Road
Fairburn, GA 30213

Phone: 964-9871

Meadow Creek Campus
P. O. Box 657
McGarity Road
McDonough, GA 30253

Phone: 957-2927

Norcross Campus
P. O. Box 4277
Norcross, GA 30091

Phone: 923-9230

Grades: K-12 (all schools)
Tuition: Grades K-5 $3,790
Grades 6-12 $3,990

Religious affiliation:
Church of Christ
Additional financial aid available : yes, but limited

Immaculate Heart of Mary School

2855 Briarcliff Road, NE
Atlanta, GA 30329

Phone: 321-3175
Grades: K-8
Tuition: Catholic $2,080
Non-Catholic $3,960

Religious affiliation: Catholic
Additional financial aid available: Yes, but limited

The Lovett School
4075 Paces Ferry Road, NW
Atlanta, GA 30327-3099

Phone:	262-3032
Grades:	1-12
Tuition:	$4,200-7,930

Religious affiliation: NONE
Additional financial aid available: extensive need-based financial assistance.

Lullwater School
705 South Candler Street
Decatur, GA 30030

Phone:	378-6643
Grades:	K-9
Tuition:	Grades K-6 $5,000 Grades 7-9 $5,280 There is a 15% discount for additional children from the same family.

Religious affiliation: NONE
Additional financial aid available: There is a limited program that allows parents to work in exchange for a tuition reduction.

Mt. Vernon Christian Academy
4449 Northside Drive, NW
Atlanta, Ga 30327

Phone:	256-4057
Grades:	8-12
Tuition:	$6,900

Religious affiliation: No denomination, but Christian orientation
Additional financial aid available:
yes, but limited

Mt. Vernon Presbyterian Academy
471 Mt. Vernon Highway, NE
Atlanta, GA 30328

Phone:	252-3448
Grades:	1-8
Tuition:	$4,150

Religious affiliation:
Mt. Vernon Presbyterian Church
Additional financial aid available:
NONE

Old National Christian Academy
2601 Flat Shoals Road
College Park, GA 30349

Phone:	996-0600
Grades:	1-6
Tuition:	$2,400

Religious affiliation:
No denomination, but christian orientation
Additional financial aid available:
very limited

Our Lady of the Assumption
1320 Hearst Drive, NE
Atlanta, GA 30319

Phone:	364-1902
Grades:	K-8
Tuition:	Catholic $1,983 Non-Catholic $3,099

Religious affiliation: Catholic
Additional financial aid available:
Yes, but limited

Our Lady of Lourdes School
29 Boulevard,NE
Atlanta, GA 30312

Phone: 581-0643/581-0367
Grades: K-6
Tuition: Catholic $2,025
Non-Catholic $2,575

Religious affiliation: Catholic
Additional financial aid available: Yes, but limited

Perimeter Christian School
5701 Spalding Drive
Norcross, GA 30092

Phone: 662-8134
Grades: 1-8
Tuition: Grades 1-2 $2,221
Grade 3 $2,400
Grades 4-8 $2,555
There is a 25% discount for addition children from the same family.

Religious affiliation: Presbyterian Church in America (Perimeter Church)
Additional financial aid available : yes, but limited

St. Anthony School
951 Ralph David Abernathy Blvd.
Atlanta, GA 30310

Phone: 755-8869
Grades: K-8
Tuition: Catholic $2,126
Non-Catholic $3,053

Religious affiliation: Catholic
Additional financial aid available: Yes, but limited

St. John the Evangalist
240 Arnold Street
Hapeville, GA 30354

Phone: 767-4312
Grades: K-8
Tuition: Catholic $1,725
Non-Catholic $2,900

Religious affiliation: Catholic
Additional financial aid available: Yes, but limited

St. John Neuman Regional School
801 Tom Smith Road
Lilburn, GA 30247

Phone: 381-0557
Grades: K-8
Tuition: Catholic $2,300
Non-Catholic $3,900

Religious affiliation: Catholic
Additional financial aid available: Yes, but limited

St. Joseph School
81 Lacy Street, NW
Marietta, GA 30060

Phone: 428-1833/428-3328
Grades: K-8
Tuition: Catholic $1,570
Non-Catholic $2,870

Religious affiliation: Catholic
Additional financial aid available: Yes, but limited

St. Jude the Apostle
7171 Glenridge Drive, NE
Atlanta, GA 30328

Phone: 394-2880
Grades: K-8
Tuition: Catholic $2,210
Non-Catholic $3,750

Religious affiliation: Catholic
Additional financial aid available: Yes, but limited

Woodward Academy
1662 Rugby Avenue
College Park, GA 30337

Phone: 765-8200
Grades: K-12
Tuition: K $4,600
1 - 12 $6,000 - $7,385

Religious affiliation: None
Additional financial aid available: Yes

Sts. Peter and Paul
2560 Tilson Road, NE
Decatur, GA 30032

Phone: 241-3063
Grades: K-8
Tuition Catholic $2,160
Non-Catholic $3,370

Religious affiliation: Catholic
Additional financial aid available:
Yes, but limited

St. Thomas More School
630 West Ponce de Leon Avenue
Decatur, GA 30032

Phone: 373-8456
Grades: K-8
Tuition: Catholic: $1,847
Non-Catholic $2,953

Religious affiliation: Catholic
Additional financial aid available: Yes, but limited

Yeshiva High School
3130 Raymond Drive
Atlanta, GA 30340

Phone: 451-5299
Grades: 8-12
Tuition: $6,450

Religious affiliation: Jewish
Additional financial aid available:
extensive need-based financial assistance.

The Walker School
700 Cobb Parkway North
Marietta, GA 30062

Phone: 427-2689
Grades: K-12
Tuition: $6,000

Religious affiliation: NONE
Additional financial aid available:
extensive need-based financial assistance.

Westminster School
1424 West Paces Ferry Road
Atlanta, GA 30327

Phone: 355-8673
Grades: K-12
Tuition: $6,000 - $8,355

Religious affiliation: NONE
Additional financial aid available:
extensive need-based financial assistance.

Children's Education Foundation
2900 Chamblee-Tucker Road • Building Six
Atlanta, Georgia 30341-4128
Telephone (404) 455-6116

Children's Education Foundation
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(404) 362-9651

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Atlanta, Georgia 30324
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Atlanta, Georgia 30319
(404) 237-2553

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100 Galleria Parkway
Atlanta, Georgia 30339
(404) 951-8891

Texas Public Policy Foundation
Private School Research Survey

February 7, 1992

Please Return By
February 20, 1992

School Name : ______________________

Address : ______________________

____

____

Phone # : ______________________

Principal : ______________________

Grades Offered : ________ to ________ **Current Number of Students Enrolled** : ________

Number of openings available for 1992-93 : ________

Number of students on federal school lunch program : ________

School student drop-out rate : ________%

	Parishioner	(If Applicable) Non-Parishioner
Total Annual Tuition For:		
One Child	: $________	$________
Two Children	: $________	$________
Three Children	: $________	$________
Four Children	: $________	$________

*If your rates are broken down by grade category, please note them on the reverse side of this form.

Generally speaking, would your school be interested in receiving students under a scholarship program subject to additional information?

________ Yes ________ No

Please refer any questions and return this survey to:

Barbara Thomson, Research Administrator
Texas Public Policy Foundation
P.O. Box 17447
San Antonio, Texas 78217
(512) 829-7138

Thank you for your cooperation.

Texas Public Policy Foundation
Private School Research Survey

February 7, 1992

Please Return By
February 20, 1992

School Name : Holy Rosary Catholic School

Address : 155 Camino Santa Maria
San Antonio, Texas 78228

Phone # : (512) 433-4312

Principal : Brenda Gonzalez

Grades Offered : PK to 8th

Current Number of Students Enrolled : 230

Number of openings available for 1992-93 : 30

Number of students on federal school lunch program : 114

School student drop-out rate : 0 %

Total Annual Tuition For:	Parishioner	(If Applicable) Non-Parishioner
One Child	: $ 1,100.00	$ 1,300.00
Two Children	: $ 1,800.00	$ 2,000.00
Three Children	: $ 2,400.00	$ 2,600.00
~~Four Children~~ Pre-Kinder	: $ 1,200.00	$ 1,400.00

*If your rates are broken down by grade category, please note them on the reverse side of this form.

Generally speaking, would your school be interested in receiving students under a scholarship program subject to additional information?

[✓ Yes] No

Please refer any questions and return this survey to:

Barbara Thomson, Research Administrator
Texas Public Policy Foundation
P.O. Box 17447
San Antonio, Texas 78217
(512) 829-7138

Thank you for your cooperation.

CHILDREN'S EDUCATIONAL OPPORTUNITY TRUST
ADMINISTRATOR'S DUTIES

TITLE : Program Administrator

REPORTS TO: Executive Vice President
Texas Public Policy Foundation

GENERAL DUTIES : The job of the Administrator shall be to oversee the daily administrative and operational components of the trust by ensuring the smooth and efficient execution of the program and its purposes and goals.

SPECIFIC DUTIES :

1. To set up the business office of the trust, including all basic and standard components such as telephones, office facilities, arrangements for copier and FAX, etc.

2. To work with the Trust Executive Committee to define and develop the specifics of an acceptable program testing criteria.

3. To work with the TPPF staff in determining office and telephone coverage.

4. To work with the Managing Director to determine the optimum record and data retention policy and procedure.

5. To set up and maintain a data base information system of all non-public schools, program applicants and grant recipients.

6. To perform all tasks necessary for the smooth and efficient running of the program, including routine school correspondence, student monitoring and tuition payments.

7. To work with the TPPF Executive Vice-President on all matters relating to administrative overhead and routine operational and budgetary issues.

8. To work with the Managing Director on all matters relating to program design and interpretation and dissemination of public information.

9. To issue operational reports with respect to the program as required, but not less frequently than monthly.

10. All other tasks as may be necessary from time to time to ensure the smooth and efficient operation of the program.

STATE OF INDIANA
OFFICE OF THE SECRETARY OF STATE

CERTIFICATE OF INCORPORATION

OF

EDUCATIONAL CHOICE CHARITABLE TRUST, INC.

I, JOSEPH H. HOGSETT, Secretary of State of Indiana, hereby certify that Articles of Incorporation of the above corporation, have been presented to me at my office accompanied by the fees prescribed by law; that I have found such
Articles conform to law; all as prescribed by the provisions of the

Indiana Nonprofit Corporation Act of 1991,

as amended.

NOW, THEREFORE, I hereby issue to such Corporation this Certificate of Incorporation, and further certify that its corporate existence will begin August 16, 1991.

In Witness Whereof, I have hereunto set my
hand and affixed the seal of the State of
Indiana, at the City of Indianapolis, this
Sixteenth day of August , 1991

Joseph H. Hogsett
JOSEPH H. HOGSETT, Secretary of State

By

Deputy

1816

BEST COPY AVAILABLE

ARTICLES OF INCORPORATION
OF
EDUCATIONAL CHOICE CHARITABLE TRUST, INC.

The undersigned Incorporator, desiring to form a corporation (the "Corporation") pursuant to the provisions of the Indiana Nonprofit Corporation Act of 1991 (the "Act"), hereby executes the following Articles of Incorporation:

ARTICLE I
Name

The name of the Corporation is Educational CHOICE Charitable Trust, Inc.

ARTICLE II
Purposes

This Corporation is a public benefit corporation that shall be organized and operated exclusively to conduct, support, encourage, and assist such religious, charitable, scientific, literary, educational, and other programs and projects as are described both in Sections 170(c)(2)(B) and 501(c)(3) of the Internal Revenue Code of 1986 or corresponding provisions of any subsequent federal tax laws (the "Code"). Without limiting the foregoing general statement of purposes, the Corporation shall, to the extent permitted of an organization described both in Sections 170(c)(2) and 501(c)(3) of the Code, make scholarships to or on behalf of children in financial need who are attending or will attend private schools in and around the City of Indianapolis, Marion County, Indiana.

BEST COPY AVAILABLE

ARTICLE III

Powers

Subject to and in furtherance of the purposes for which it is organized, the Corporation shall possess, in addition to the general rights, privileges, and powers conferred by law, the following rights, privileges, and powers:

Section 1. To continue as a corporation under its corporate name perpetually.

Section 2. To sue, be sued, complain, and defend in the Corporation's corporate name.

Section 3. To have a corporate seal or facsimile of a corporate seal, which may be altered at will, to use by impressing or affixing or in any other manner reproducing it. However, the use or impression of a corporate seal is not required and does not affect the validity of any instrument.

Section 4. To make or amend bylaws not inconsistent with the Corporation's Articles of Incorporation or with Indiana law for managing the affairs of the Corporation.

Section 5. To purchase, receive, take by gift, devise, or bequest, lease, or otherwise acquire, and own, hold, improve, use, and otherwise deal with, real or personal property, or any legal or equitable interest in property, wherever located.

Section 6. To sell, convey, mortgage, pledge, lease, exchange and otherwise dispose of all or any part of the Corporation's property.

Section 7. To purchase, receive, subscribe for, or otherwise acquire, own, hold, vote, use, sell, mortgage, lend, pledge, or otherwise dispose of, and deal in and with, shares or other interests in, or obligations of any entity.

Section 8. To make contracts and guaranties, incur liabilities, borrow money, issue notes, bonds, and other obligations and secure any of the Corporation's obligations by mortgage or pledge of any of the Corporation's property, franchises, or income.

Section 9. To lend money, invest and reinvest the Corporation's funds, and receive and hold real and personal property as security for repayment, except as provided under applicable law.

Section 10. To be a promoter, a partner, a member, an associate or a manager of any partnership, joint venture, trust, or other entity.

Section 11. To conduct the Corporation's activities, locate offices, and exercise the powers granted to it inside or outside Indiana.

Section 12. To elect directors, elect and appoint officers, and appoint employees and agents of the Corporation, define the duties and fix the compensation of directors, officers, employees, and agents.

Section 13. To pay pensions and establish pension plans, pension trusts, and other benefit and incentive plans for the

Corporation's current or former directors, officers, employees, and agents.

Section 14. To make donations not inconsistent with law for the public welfare or for charitable, religious, scientific, or educational purposes and for other purposes that further the corporate interest.

Section 15. To carry on a business.

Section 16. To have and exercise powers of a trustee as permitted by law, including those set forth in Indiana Code section 30-4-3-3 as it may be amended from time to time.

Section 17. To purchase and maintain insurance on behalf of any individual who:

(a) is or was a director, an officer, an employee, or an agent of the Corporation; or

(b) is or was serving at the request of the Corporation as a director, an officer, an employee, or an agent of another entity;

against any liability asserted against or incurred by the individual in that capacity or arising from the individual's status as a director, an officer, an employee, or an agent, whether or not the Corporation would have power to indemnify the individual against the same liability under applicable law.

Section 18. To do all things necessary or convenient, not inconsistent with law, to further the activities and affairs of the Corporation.

Section 19. To cease its activities and to dissolve and surrender its corporate franchise.

Section 20. To indemnify any person against liability and expenses, and to advance the expenses incurred by such person, in connection with the defense of any threatened, pending, or completed action, suit, or proceeding, whether civil, criminal, administrative, investigative, or otherwise, and whether formal or informal, to the fullest extent permitted by applicable law, or, if not permitted, then to any extent not prohibited by such law.

ARTICLE IV

Period of Existence

The period during which the Corporation shall continue is perpetual.

ARTICLE V

Registered Agent and Registered Office

Section 1. The name and address of the initial registered agent in charge of the Corporation's registered office are John M. Whelan, Golden Rule Building, 7440 Woodland Drive, Indianapolis, Indiana 46278-1719.

Section 2. The street address of the initial registered office of the Corporation is 7440 Woodland Drive, Indianapolis, Indiana 46278-1719.

ARTICLE VI

Incorporator

The name and address of the Incorporator of the Corporation are John M. Whelan, Golden Rule Building, 7440 Woodland Drive, Indianapolis, Indiana 46278-1719.

ARTICLE VII

Members

The Corporation shall have no members.

ARTICLE VIII

Directors

The exact number of directors of the Corporation shall be specified in or fixed in accordance with the Bylaws of the Corporation at a number no smaller than three (3).

ARTICLE IX

Initial Board of Directors

The names and addresses of the members of the initial Board of Directors are as follows:

J. Patrick Rooney
Golden Rule Building
7440 Woodland Drive
Indianapolis, Indiana 46278-1719

John M. Whelan
Golden Rule Building
7440 Woodland Drive
Indianapolis, Indiana 46278-1719

H. Patrick Callahan
Baker & Daniels
300 North Meridian Street, Suite 2700
Indianapolis, Indiana 46204

Bill Styring
Indiana Chamber of Commerce
1 North Capitol
Indianapolis, Indiana 46204

Carol D'Amico
Hudson Institute
P.O. Box 26-919
Indianapolis, Indiana 46226

ARTICLE X

Election of Directors

Section 1. The directors of the Corporation, other than the members of the initial Board of Directors, shall be elected by the directors of the Corporation.

Section 2. Each member of the Board of Directors named in these Articles of Incorporation shall serve a term of one year and until her or his successor is elected and qualified. Thereafter, except as otherwise provided in these Articles of Incorporation, directors shall serve for terms as specified in or fixed in accordance with the Bylaws of the Corporation. A director may serve any number of consecutive or nonconsecutive terms.

Section 3. A director may be removed, with or without cause, by a majority of directors then in office.

ARTICLE XI

Regulation of Corporate Affairs

The affairs of the Corporation shall be subject to the following provisions:

Section 1. Notwithstanding any other provision of these Articles of Incorporation, should the Corporation be determined at any point in time to be a private foundation within the meaning of Section 509(a) of the Code, then the Corporation's income for each taxable year shall be distributed at such time and in such manner as not to subject the Corporation to the tax imposed by Section 4942 of the Code.

Section 2. Notwithstanding any other provision of these Articles of Incorporation, should the Corporation be determined at any point in time to be a private foundation within the meaning of Section 509(a) of the Code, then the Corporation shall not:

2.1. Engage in any act of self dealing as defined in Section 4941(d) of the Code;

2.2. Retain any excess business holdings as defined in Section 4943(c) of the Code;

2.3. Make any investments in such manner as to subject the Corporation to tax under Section 4944 of the Code; or

2.4. Make any taxable expenditures as defined in Section 4945(d) of the Code.

Section 3. Neither the Board of Directors nor the Corporation shall have power or authority to do any act that will prevent the Corporation from being an organization described in Section 501(c)(3) of the Code.

Section 4. None of the Corporation's net earnings shall inure to the benefit of any private individual.

Section 5. No substantial part of the activities of the Corporation shall be or consist of carrying on propaganda, or otherwise attempting, to influence legislation.

Section 6. The Corporation shall not participate or intervene in (including the publishing or distributing of statements) any political campaign on behalf of or in opposition to any candidate for public office.

Section 7. Subject to the provisions of these Articles of Incorporation and applicable law, the Board of Directors shall have complete and plenary power to manage, control, and conduct all the affairs of the Corporation.

Section 8. The power to make, alter, amend, and repeal the Corporation's Bylaws shall be vested in the Board of Directors.

Section 9. No director of the Corporation shall be liable for any of its obligations.

Section 10. Meetings of the Board of Directors may be held at any location, either inside the State of Indiana or elsewhere.

Section 11. All parties dealing with the Corporation shall have the right to rely upon any action taken by the Corporation pursuant to authorization by the Board of Directors by resolution duly adopted in accordance with the Corporation's Articles of Incorporation, Bylaws, and applicable law.

Section 12. (a) To the extent not inconsistent with applicable law, every person (and the heirs and personal representatives of such person) who is or was a director or officer of the Corporation shall be indemnified by the Corporation against all liability and reasonable expense that may be incurred by her or him in connection with or resulting from any claim, action, suit or proceeding (i) if such person is wholly successful with respect thereof or, (ii) if not wholly successful, then if such person is determined as provided in paragraph (e) of this Section 12 to have acted in good faith, in what he or she reasonably believed to be the best interests of the Corporation (or, in any case not involving the person's official capacity with the Corporation, in what he or she reasonably believed to be not opposed to the best interests of the Corporation) and, in addition, with respect to any criminal action or proceeding, is determined to have had reasonable cause to believe that the conduct was lawful (or no reasonable cause to believe that the conduct was unlawful). The termination of any claim, action, suit, or proceeding, by judgment, settlement (whether with or without court approval), or conviction or upon a plea of guilty or of nolo contendere, or its equivalent, shall not create a presumption that a person did not meet the standards of conduct set forth in this Section 12.

(b) As used in this Section 12, the terms "claim, action, suit or proceeding" shall include any threatened, pending, or completed claim, action, suit, or proceeding and all appeals thereof (whether brought by or in the right of this Corporation, any other corporation or otherwise), civil, criminal, administrative, or investigative, whether formal or informal, in which a person (or her or his heirs or personal representatives) may become involved, as a party or otherwise:

(i) By reason of her or his being or having been a director or officer of the Corporation or of any corporation where he or she served as such at the request of the Corporation, or

(ii) By reason of her or his acting or having acted in any capacity in a corporation, partnership, joint venture, association, trust or other organization or entity where he or she served as such at the request of the Corporation, or

(iii) By reason of any action taken or not taken by her or him in any such capacity, whether or not he or she continues in such capacity at the time such liability or expense shall have been incurred.

(c) As used in this Section 12, the terms "liability" and "expense" shall include, but shall not be limited to, counsel fees and disbursements and amounts of judgments, fines, or penalties against, and amounts paid in settlement by or on behalf of, a person.

(d) As used in this Section 12, the term "wholly successful" shall mean (i) termination of any action, suit or proceeding against the person in question without any finding of liability or guilt against her or him, (ii) approval by a court, with knowledge of the indemnity herein provided, of a settlement of any action, suit, or proceeding, or (iii) the expiration of a reasonable period of time after the making of any claim or threat of any action, suit or proceeding without the institution of the same, without any payment or promise made to induce a settlement.

(e) Every person claiming indemnification hereunder (other than one who has been wholly successful with respect to any claim, action, suit, or proceeding) shall be entitled to indemnification (i) if special independent legal counsel, which may be regular counsel of the Corporation or other disinterested person or persons, in either case selected by the Board of Directors, whether or not a disinterested quorum exists (such counsel or person or persons being hereinafter called the referee), shall deliver to the Corporation a written finding that such person has met the standards of conduct set forth in the preceding paragraph (a) and (ii) if the Board of Directors, acting upon such written finding, so determines. The person claiming indemnification shall, if requested, appear before the referee and answer questions which the referee deems relevant and shall be given ample opportunity to present to the referee evidence upon which he or she relies for indemnification. The Corporation shall, at the request of the referee, make available facts, opinions or other evidence in any way relevant to the referee's findings which are within the possession or control of the Corporation.

(f) The right of indemnification provided in this Section 12 shall be in addition to any rights to which any person may otherwise be entitled. Irrespective of the provisions of this Section 12, the Board of Directors may, at any time and from time to time, approve indemnification of directors, officers, or other persons to the fullest extent permitted by applicable law, or, if not permitted, then to any extent not prohibited by such law, whether on account of past or future transactions.

(g) Expenses incurred with respect to any claim, action, suit or proceeding may be advanced by the Corporation (by action of the Board of Directors, whether or not a disinterested quorum exists) prior to the final disposition thereof upon receipt of an undertaking by or on behalf of the recipient to repay such amount unless he or she is entitled to indemnification.

(h) The Board of Directors is authorized and empowered to purchase insurance covering the Corporation's liabilities and obligations under this Section 12 and insurance protecting the Corporation's directors or officers, or other persons.

Section 13. The Board of Directors may from time to time, in the Bylaws of the Corporation or by resolution, designate such committees as the Board of Directors may deem desirable for the furtherance of the purposes of the Corporation.

Section 14. If the Corporation is dissolved, all of its property remaining after payment and discharge of its obligations shall be transferred and conveyed, subject to any contractual or legal requirement, to one or more other organizations that have been selected by the Board of Directors, that are organized and operated for purposes substantially the same as those of the Corporation, and that are described in Section 501(c)(3) of the Code.

The undersigned Incorporator hereby adopts these Articles of Incorporation and presents them to the Secretary of State of the State of Indiana for filing.

IN WITNESS WHEREOF, the undersigned Incorporator hereby verifies and affirms, subject to penalties of perjury, that the representations contained herein are true, this 15th day of August, 1991.

John M. Whelan
Incorporator

This instrument was prepared by Ben W. Blanton, Attorney at Law, Baker & Daniels, 300 N. Meridian Street, Suite 2700, Indianapolis, Indiana 46204.

BY-LAWS
OF
CHILDREN'S EDUCATIONAL OPPORTUNITY FOUNDATION
A Texas Non-Profit Corporation

ARTICLE I

NAME

The Corporation shall be known as Children's Educational Opportunity Foundation ("the Corporation"), a Texas non-profit corporation, having no issue of stock, formed pursuant to the provisions of the Texas Non-Profit Corporation Act.

ARTICLE II

ADDRESS

The principal office of the Corporation in the State of Texas is: 8122 Datapoint, Suite 900, San Antonio, Texas. The Corporation may hereafter at any time and from time to time maintain such other office or offices as may be determined and established by its activities and requirements.

Records of the Corporation shall be kept at its office, including the Articles of Incorporation, By-Laws, and Minutes of the proceedings of all corporate meetings, and the meetings of the Board of Directors. There shall also be kept at the office the official roll of the names and addresses of the Directors and Officers of the Corporation.

These records shall be made available for review by any member of the Corporation upon request to the Secretary.

ARTICLE III

PURPOSE

The Corporation shall have the authority to take any action permitted to be taken by a corporation under the Texas Non-Profit Corporation Act.

The general purposes for which the Corporation is organized are to operate exclusively for religious, charitable, scientific, literary or educational purposes, either directly or by contributions to organizations that qualify as exempt organizations under Section 501 (c)(3) of the Internal Revenue Code and its Regulations as they now exist or as they may hereafter be amended, and to engage in any and all lawful activities incidental to the foregoing purposes, except as restricted herein.

The initial purpose for which the corporation is formed is to provide educational opportunities and assistance to children who are unable to achieve the same or have difficulty doing so for financial reasons.

No part of the net earnings of the Corporation shall inure to the benefit of any member, director, trustee or officer of the Corporation, or any private individual (except that reasonable compensation may be paid for services rendered to or for the Corporation in effecting one or more of its purposes), and no member, director, trustee or officer of the Corporation, or any private individual shall be entitled to share in the distribution of any of the corporate assets or dissolution of the Corporation.

ARTICLE IV

MEMBERSHIP

Section 1. Membership. The Corporation shall not have members or shareholders.

Section 2. Right to Assets. No Director or Officer shall have any vested right, interest, or privilege in or to the assets, functions, affairs, or franchise of the Corporation, or any right, interest, or privilege which may be transferable or inheritable, or which shall continue if his membership ceases.

Legal title to all assets of the Corporation shall be vested in the Corporation and its successors and assigns, with full power and authority in the Board of Directors either to protect, conserve, and to see or to acquire, or to lease, or to encumber or to construct, or otherwise to acquire, manage or dispose of the real and personal property of the Corporation in accordance with the provision and restrictions of the Articles of Incorporation of the Corporation, its By-Laws, and as the same may be amended from time to time. No Director or Officer of this Corporation shall be personally liable for any of its debts, liabilities, or obligations, nor shall any Director be subject to any assessment of any kind.

ARTICLE V

BOARD OF DIRECTORS

Section 1. Duties and Responsibilities. All powers of the Corporation shall be vested in a Board of Directors acting for the benefit of the Corporation. It shall be the general responsibility of the Board of Directors to establish and control the administrative policies and business of the Corporation, in accordance with the purposes for which it is organized as set forth in the Corporation's Articles of Incorporation. The Board of Directors shall have the general power to manage and control the administrative affairs and property of the Corporation, and shall have full power, by majority vote, to adopt resolutions governing the action of the Board and shall have full and complete authority, with respect to the distribution and payments of the monies received by the Corporation from time to time, except that the fundamental and basic purposes of the Corporation, as expressed in the Articles of Incorporation, shall not thereby be amended or changed, and except further that the Board of Directors shall not permit any part of the earnings or capital to inure to the benefit of any director, trustee, officer or other private individual.

Section 2. Number of Directors. The number of Directors of the Corporation shall consist of not less than three (3). Additional Directors may be added to the Board of Directors from time to time, as determined by the then existing Board of Directors.

The present Directors consist of the following individuals who shall serve the full term of his Directorship as specified below, or as shall be established upon his election as Director, or until such time as his successor shall be elected:

NAME	ADDRESS
James R. Leininger	200 Canada Verde San Antonio, TX 78232
Fritz S. Steiger	619 Robinhood San Antonio, TX 78209
Robert B. Aguirre	601 Howard San Antonio, TX 78212

Section 3. Election. Directors shall be elected no later than May 1 each year, or at such other time as the Board of Directors shall determine.

Section 4. Vacancies and Removals. Upon the occurrence of a vacancy, for any reason, in the Board of Directors a Director may be added to the Board to fill the term of the vacancy upon election by majority vote of the remaining Director at any meeting of the Board. Any Director may be removed with or without cause by a majority vote of the directors at any meeting duly called and at which a quorum is present, and the remaining directors may thereupon elect a successor or successors to fill any resulting vacancy for the unexpired term of any removed director.

ARTICLE VI

COMPENSATION

No Officer or Director of the Corporation shall receive, directly or indirectly, any salary, compensation or emolument as a result of his service to the Corporation provided, however, that anyone (including all Officers or Director) specifically approved by the Board of Directors as employees of the Corporation shall receive compensation for their efforts.

ARTICLE VII

OFFICERS

Section 1. Number and Positions. The Officers of the Corporation shall be as follows: a President, a Managing Director, a Vice President, and a Secretary. No individual may hold the offices of President and Secretary. Treasurers may be appointed as required, and other assistant officers may be established by the Board as it shall deem necessary.

Section 2. Term of Office. The term of office for each Officer shall be for one (1) year. One person may succeed himself as an Officer in the Corporation. The Board of Director shall select and appoint each Officer, and each Officer shall be subject to the supervision of the Board.

Section 3. President -- Powers and Duties. The President shall be the principal spokesperson of the corporation and shall in general represent and promote the efforts and accomplishments of the corporation. He shall have the authority to contractually bind the corporation or act on behalf of the corporation. He shall attend all meetings of the Board of Directors and serve as a member thereof.

Section 4. Managing Director -- Powers and Duties. The Managing Director, shall act as a spokesman for the Corporation, and together with the Vice President, shall, in general, supervise and control all of the business and affairs of the Corporation. His duties shall include, but are no means limited hereto, the engagement and dismissal of employees and staff personnel, the advancement and promotion of the Corporation, and its goals and for the solicitation of contributions thereto. The Managing Director shall perform all the duties necessary and incident to the day to day operation of the Corporation including such duties as may be prescribed by the Board of Directors from time to time.

Section 5. Vice President -- Powers and Duties. The Vice President shall be the principal executive officer of the corporation and shall in general supervise and control all of the business and affairs of the corporation. He shall attend all meetings of the Board of Directors. He may sign, with the Secretary, or any other proper officer of the Corporation authorized by the Board of Directors, any deeds, mortgages, bonds, contracts, or other instruments which the Board of Directors have authorized to be executed, except in cases where the signing and execution thereof shall be expressly delegated by the Board of Directors or by these By-Laws or by statute to some other officer or agent of the Corporation; and in general shall perform all duties incident to the office of the Chief Executive Officer and such other duties as may be prescribed by the Board of Directors from time to time. The Vice President shall act as the Chief Administrative Officer of the Corporation during the incapacity or extended leave of absence of the President, and shall perform such further duties as the Board of Directors shall prescribe.

Section 6. Treasurer -- Power and Duties. The Treasurer shall have general charge and supervision of the records and accounts of the Corporation, and, under the discretion of the Board of Directors, shall have charge of and be responsible for all monies and other assets of the Corporation which may come into his hands. The Treasurer shall keep, or cause to be kept, full and accurate accounts of receipts and disbursements of the Corporation, and shall cause to be deposited all monies and other valuable effects of the Corporation in the name of and to the credit of the Corporation in such banks or depositories as the Board shall designate. He shall render financial statements from time to time as requested by the Board of Director for their review and also for presentation to the membership.

He shall have such other powers and duties as are usually associated with the Office of Treasurer, including, without limitation, the power to execute notes, checks, drafts, or bills of exchange, warrants or other orders for the payment of money by jointly signing the same with the President or the Secretary or with any other Director as authorized by the Board of Directors, and to give receipts for cash and other property or assets delivered to the Corporation. He may, jointly with the President, negotiate loans, mortgages, or incur other debts in the name of the Corporation, whether or not they are secured by Corporate assets or property.

He shall, if required by the Board of Directors, furnish bond or other security in such form and amount, and with one or more sureties, as may be acceptable to the Board of Directors, such bond to be conditioned upon the faithful performance by the Treasurer of the duties of his office as the Board of Directors may determine.

If no Treasurer is elected, the Vice President shall serve as Treasurer.

Section 7. Secretary -- Powers and Duties. The Secretary shall preside as Secretary and shall record the minutes of all meetings of the Board of Directors in books proper for that purpose; he shall have custody of all such records of official meetings and shall maintain the official list of corporation members. He shall attend to the giving and serving of all notices of all meetings as may be required by these By-Laws. With the President, or the Treasurer, he may sign all notes, checks, drafts, or bills of exchange, warrants or other orders for the payment of money duly drawn upon proper authorization by the Board of Directors, as well as the power to disburse corporate funds in accordance with procedures established by the Board of Directors. He may, jointly with the President, negotiate loans, mortgages, or incur other debts in the name of the Corporation whether or not secured by corporate assets or property.

He shall have such other powers and duties as are usually associated with the Office of Secretary, subject to the control of the Board of Directors, and he shall perform such further and additional duties as shall from time to time be prescribed or assigned to him by the Board of Directors.

ARTICLE VIII

MEETINGS

Section 1. Meetings of the Corporation. All meetings of the Corporation shall begin and end with prayer. Meetings of the Board of Directors shall be held monthly on the last Tuesday of the month or from time to time as specified both as to time and place by the Board of Directors. The annual meting of the Corporation shall be held in April of each year. In addition, other meetings may be held from time to time upon due and proper notice.

Section 2. Called Meetings. Special meetings of the Corporation may be called by the Directors of the President, stating the purpose of the meeting. The Board of Directors shall thereupon call such meeting by proper notice and establish the date, time and place of the meeting which shall be held no less than four (4) days nor more than fourteen (14) days from the date the request was made.

Section 3. Notice of Called Meetings. Notice shall be in writing, delivered to the Director by personal delivery or by mail. If mailed, such notice shall be deemed to be delivered when deposited in the United States mail addressed to the Director at his address as it appears on the records of the corporation, with postage thereon paid.

Section 4. Quorum. For the purpose of conducting Corporation business, fifty percent (50%) of the Directors present at any meeting shall be considered to be a quorum, and any action approved by the majority of those present, except for those instances where a specific portion of the membership is required for action, shall be considered binding upon the Corporation. No action may be taken by the Board of Directors unless a quorum is present at their meetings, and only if such action is approved by a majority of those Directors present.

At the annual meeting of the Board of Directors each year, the Board of Directors shall elect trustees to replace those directors whose terms are due to expire in accordance with the provisions of Article V, Section 3 of these By-Laws. Prior to each annual meeting, the Board of Directors shall designate a nominating committee which shall propose a slate of nominee trustees with respect to which the current members of the Board of Directors shall vote. The Nominating Committee shall be encouraged to include all prospective nominees who are qualified to serve on the Board of Directors and who have expressed an interest in so serving. All votes for new members of the Board of Directors shall be by secret ballot. Each director shall elect the new directors. Each incumbent director shall have the right to one vote for each directorship which is up for election and a new director must receive a majority of the votes being cast for a director position in order to be elected. In the event that an insufficient number of candidates receive a majority of the votes needed to be elected or several candidates receive a majority of the votes being cast, a run-off election(s) shall be held by eliminating the nominee who has received the fewest votes and any nominee with a sufficient number of votes to be declared a Director. Several run-offs may be necessary in order to complete an election. (In other words, if two of the seats on a five person board are up for election, the five directors have a total of ten votes which they may cast. If there are four nominees and they receive three, three, three and one vote, the person receiving one vote would be eliminated. If on the next round, the votes are cast four, three and three, the person receiving four votes would be elected and the directors would then vote with respect to the two remaining nominees for the last remaining position. If there were five nominees and they received three, two, two, two and one votes, the person receiving three votes would be elected and those nominees receiving two votes would be in a run-off.)

ARTICLE IX

AMENDMENT OF BY-LAWS

These By-Laws may be altered, amended, repealed, or added to by the affirmative vote of a two-thirds (2/3) majority of the Board of Directors.

ARTICLE X

INDEMNIFICATION

The Corporation shall indemnify its directors, trustees, officers, employees and agents from and against any and all liabilities, costs and expenses incurred by them in such capacities to the fullest extent permitted by the Texas Non-Profit Corporation Act, as presently in effect and as may be hereafter amended, and shall have the power to purchase and maintain liability insurance coverage for those persons as, and to the fullest extent, permitted by the Texas Non-Profit Corporation Act, as presently in effect and as may hereafter be amended.

ARTICLE XI

SEVERABILITY

The provisions of these By-Laws shall be separable each from any and all other provisions of these By-Laws. If any such provisions shall be adjudged to be invalid or unenforceable, such invalidity or unenforceability shall not affect any other provisions hereof, or the powers granted to this Corporation by the Articles of Incorporation or By-Laws.

ARTICLE XII

DISSOLUTION

Upon the dissolution of the Corporation, the Board of Directors shall, after paying or making provision for the payment of all of the liabilities of the Corporation, dispose of all the assets of the Corporation to such organization or organizations established and operated exclusively for charitable purposes and who have qualified as an entity operating with Section 501(c)(3) of the Internal Revenue Code purposes.

The decision of the Board of Directors shall be final in the disposition of the Corporation assets.

ARTICLE XIII

FISCAL YEAR

The Corporation shall operate on a fiscal year which shall begin on January 1st of each year and end on December 31st of each year. The fiscal year period may be changed from time to time as determined by the Board of Directors.

The above By-Laws have been approved by the Corporation as of February 11, 1992.

Thomas W. Lyles
Secretary

BYLAWS.CEO

Form **1023**
(Rev. September 1990)
Department of the Treasury
Internal Revenue Service

Application for Recognition of Exemption
Under Section 501(c)(3) of the Internal Revenue Code

OMB No. 1545-0056

If exempt status is approved, this application will be open for public inspection

Read the instructions for each Part carefully.

A User Fee must be attached to this application.

If the required information and appropriate documents are not submitted along with Form 8718 (with payment of the appropriate user fee), the application may be returned to you.

Part I **Identification of Applicant**

1a Full name of organization (as shown in organizing document)
Educational CHOICE Charitable Trust, Inc. ("Corporation")

2 Employer identification number (If none, see instructions.)
None: SS-4 attached

1b c/o Name (if applicable)
John M. Whelan

3 Name and telephone number of person to be contacted if additional information is needed
Ben W. Blanton
(317) 237-0300

1c Address (number, street, and room or suite no.)
Golden Rule Building
7440 Woodland Drive

1d City or town, state, and ZIP code
Indianapolis, Indiana 46278-1719

4 Month the annual accounting period ends
June

5 Date incorporated or formed
August 16, 1991

6 Activity codes (See instructions.)
040 043

7 Check here if applying under section:
a ☐ 501(e) b ☐ 501(f) c ☐ 501(k)

8 Did the organization previously apply for recognition of exemption under this Code section or under any other section of the Code? . . . . ☐ Yes ☒ No
If "Yes," attach an explanation.

9 Has the organization filed Federal income tax returns or exempt organization information returns? . . . . ☐ Yes ☒ No
If "Yes," state the form numbers, years filed, and Internal Revenue office where filed.

10 Check the box for your type of organization. BE SURE TO ATTACH A COMPLETE COPY OF THE CORRESPONDING DOCUMENTS TO THE APPLICATION BEFORE MAILING.

a ☒ Corporation— Attach a copy of your Articles of Incorporation, (including amendments and restatements) showing approval by the appropriate State official; also include a copy of your bylaws. See attached Exhibits A (Articles of Incorporation) and B (Bylaws)

b ☐ Trust— Attach a copy of your Trust Indenture or Agreement, including all appropriate signatures and dates.

c ☐ Association— Attach a copy of your Articles of Association, Constitution, or other creating document, with a declaration (see instructions) or other evidence the organization was formed by adoption of the document by more than one person; also include a copy of your bylaws.

If you are a corporation or an unincorporated association that has not yet adopted bylaws, check here . . . . ▶ ☐

I declare under the penalties of perjury that I am authorized to sign this application on behalf of the above organization and that I have examined this application, including the accompanying schedules and attachments, and to the best of my knowledge it is true, correct, and complete.

Please Sign Here ▶ John M. Whelan (Signature) Treasurer (Title or authority of signer) 8/16/91 (Date)

John M. Whelan

For Paperwork Reduction Act Notice, see page 1 of the instructions.

Complete the Procedural Checklist (page 7 of the instructions) prior to filing.

Part II Activities and Operational Information

1 Provide a detailed narrative description of all the activities of the organization—past, present, and planned. **Do not merely refer to or repeat the language in your organizational document.** Describe each activity separately in the order of importance. Each description should include, as a minimum, the following: (a) a detailed description of the activity including its purpose; (b) when the activity was or will be initiated; and (c) where and by whom the activity will be conducted.

See attached Exhibit C.

2 What are or will be the organization's sources of financial support? List in order of size.

See attached Exhibit D.

3 Describe the organization's fundraising program, both actual and planned, and explain to what extent it has been put into effect. Include details of fundraising activities such as selective mailings, formation of fundraising committees, use of volunteers or professional fundraisers, etc. Attach representative copies of solicitations for financial support.

The Corporation will solicit businesses ~~and~~ individuals interested in the Corporatic its scholarship program. Such solicitations will be made through selective mailings, personal contacts, and press releases describing the scholarship program. See Exhibit

Part II **Activities and Operational Information** ***(Continued)***

4 Give the following information about the organization's governing body:

a Names, addresses, and titles of officers, directors, trustees, etc.	**b Annual Compensation**
J. Patrick Rooney, Director and President, Golden Rule Building, 7440 Woodland Dr., Indianapolis, IN 46278-1719	None
John M. Whelan, Director and Treasurer, Golden Rule Building, 7440 Woodland Dr., Indianapolis, IN 46278-1719	None
H. Patrick Callahan, Director and Secretary, Baker & Daniels, 300 N. Meridian St., Ste. 2700, Indianapolis, IN 46204	None
Bill Styring, Indiana Chamber of Commerce, 1 North Capitol, Indianapolis, IN 46204 (Director)	None
Carol D'Amico, Hudson Institute, P.O. Box 26-919, Indianapolis, IN 46226 (Director)	None

c Do any of the above persons serve as members of the governing body by reason of being public officials or being appointed by public officials? . . . ☐ Yes ☒ No

If "Yes," name those persons and explain the basis of their selection or appointment.

d Are any members of the organization's governing body "disqualified persons" with respect to the organization (other than by reason of being a member of the governing body) or do any of the members have either a business or family relationship with "disqualified persons"? (See the specific instructions for line 4d.) . . . ☒ Yes ☐ No

If "Yes," explain.

J. Patrick Rooney, Director and President of the Corporation, is a partner in a partnership that controls the majority shares of Golden Rule Financial Corporation, which wholly owns the Golden Rule Insurance Company (a substantial contributor to the Corporation).

5 Does the organization control or is it controlled by any other organization? . . . ☐ Yes ☒ No

Is the organization the outgrowth of (or successor to) another organization, or does it have a special relationship with another organization by reason of interlocking directorates or other factors? . . . ☐ Yes ☒ No

If either of these questions is answered "Yes," explain.

Two of the members of the initial Board of Directors are directors and officers of Golden Rule Insurance Company, a primary contributor to the Corporation, however.

6 Does or will the organization directly or indirectly engage in any of the following transactions with any political organization or other exempt organization (other than 501(c)(3) organizations): (a) grants; (b) purchases or sales of assets; (c) rental of facilities or equipment; (d) loans or loan guarantees; (e) reimbursement arrangements; (f) performance of services, membership, or fundraising solicitations; or (g) sharing of facilities, equipment, mailing lists or other assets, or paid employees? . . . ☐ Yes ☒ No

If "Yes," explain fully and identify the other organizations involved.

7 Is the organization financially accountable to any other organization? . . . ☐ Yes ☒ No

If "Yes," explain and identify the other organization. Include details concerning accountability or attach copies of reports if any have been submitted.

Part II **Activities and Operational Information** *(Continued)*

8 What assets does the organization have that are used in the performance of its exempt function? (Do not include property producing investment income.) If any assets are not fully operational, explain their status, what additional steps remain to be completed, and when such final steps will be taken. If "None," indicate "N/A."

N/A

9a Will any of the organization's facilities or operations be managed by another organization or individual under a contractual agreement? ☐ Yes ☒ No

b Is the organization a party to any leases? ☐ Yes ☒ No

If either of these questions is answered "Yes," attach a copy of the contracts and explain the relationship between the applicant and the other parties.

10 Is the organization a membership organization? ☐ Yes ☒ No

If "Yes," complete the following:

a Describe the organization's membership requirements, and attach a schedule of membership fees and dues.

b Describe your present and proposed efforts to attract members, and attach a copy of any descriptive literature or promotional material used for this purpose.

c What benefits do (or will) your members receive in exchange for their payment of dues?

11a If the organization provides benefits, services or products, are the recipients required, or will they be required, to pay for them? ☐ N/A ☐ Yes ☒ No

If "Yes," explain how the charges are determined, and attach a copy of your current fee schedule.

b Does or will the organization limit its benefits, services or products to specific individuals or classes of individuals? ☐ N/A ☒ Yes ☐ No

If "Yes," explain how the recipients or beneficiaries are or will be selected.

See attached Exhibit E.

12 Does or will the organization attempt to influence legislation? ☐ Yes ☒ No

If "Yes," explain. Also, give an estimate of the percentage of the organization's time and funds which it devotes or plans to devote to this activity.

13 Does or will the organization intervene in any way in political campaigns, including the publication or distribution of statements? ☐ Yes ☒ No

If "Yes," explain fully.

Part III **Technical Requirements**

1 Are you filing Form 1023 within 15 months from the end of the month in which you were created or formed? ☒ Yes ☐ No
If you answer "Yes," do not answer questions 2 through 6.

2 If one of the exceptions to the 15-month filing requirement shown below applies, check the appropriate box and proceed to question 7.

Exceptions—You are not required to file an exemption application within 15 months if the organization:

☐ (a) Is a church, interchurch organization, local unit of a church, a convention or association of churches, or an integrated auxiliary of a church;

☐ (b) Is not a private foundation and normally has gross receipts of not more than $5,000 in each tax year; or,

☐ (c) Is a subordinate organization covered by a group exemption letter, but only if the parent or supervisory organization timely submitted a notice covering the subordinate.

3 If you do not meet any of the exceptions in question 2, do you wish to request relief from the 15-month filing requirement? . . . . ☐ Yes ☐ No

4 If you answer "Yes" to question 3, please give your reasons for not filing this application within 15 months from the end of the month in which your organization was created or formed. **(See the instructions before completing this item.)**

5 If you answer "No" to both questions 1 and 3 and do not meet any of the exceptions in question 2, your qualification as a section 501(c)(3) organization can be recognized only from the date this application is filed with your key District Director. Therefore, do you want us to consider your application as a request for recognition of exemption as a section 501(c)(3) organization from the date the application is received and not retroactively to the date you were formed? . . . . ☐ Yes ☐ No

6 If you answer "Yes" to question 5 above and wish to request recognition of section 501(c)(4) status for the period beginning with the date you were formed and ending with the date your Form 1023 application was received (the effective date of your section 501(c)(3) status), check here ▶ ☐ and attach a completed page 1 of Form 1024 to this application.

Part III Technical Requirements *(Continued)*

7 Is the organization a private foundation?

☐ Yes (Answer question 8.)

☒ No (Answer question 9 and proceed as instructed.)

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8 If you answer "Yes" to question 7, do you claim to be a private operating foundation?

☐ Yes (Complete Schedule E)

☐ No

After answering this question, go to Part IV.

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9 If you answer "No" to question 7, indicate the public charity classification you are requesting by checking the box below that most appropriately applies:

THE ORGANIZATION IS NOT A PRIVATE FOUNDATION BECAUSE IT QUALIFIES:

(a)	☐	As a church or a convention or association of churches (CHURCHES MUST COMPLETE SCHEDULE A).	Sections 509(a)(1) and 170(b)(1)(A)(i)
(b)	☐	As a school (MUST COMPLETE SCHEDULE B).	Sections 509(a)(1) and 170(b)(1)(A)(ii)
(c)	☐	As a hospital or a cooperative hospital service organization, or a medical research organization operated in conjunction with a hospital (MUST COMPLETE SCHEDULE C).	Sections 509(a)(1) and 170(b)(1)(A)(iii)
(d)	☐	As a governmental unit described in section 170(c)(1).	Sections 509(a)(1) and 170(b)(1)(A)(v)
(e)	☐	As being operated solely for the benefit of, or in connection with, one or more of the organizations described in (a) through (d), (g), (h), or (i) (MUST COMPLETE SCHEDULE D).	Section 509(a)(3)
(f)	☐	As being organized and operated exclusively for testing for public safety.	Section 509(a)(4)
(g)	☐	As being operated for the benefit of a college or university that is owned or operated by a governmental unit.	Sections 509(a)(1) and 170(b)(1)(A)(iv)
(h)	☒	As receiving a substantial part of its support in the form of contributions from publicly supported organizations, from a governmental unit, or from the general public.	Sections 509(a)(1) and 170(b)(1)(A)(vi)
(i)	☐	As normally receiving not more than one-third of its support from gross investment income and more than one-third of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions (subject to certain exceptions).	Section 509(a)(2)
(j)	☐	We are a publicly supported organization but are not sure whether we meet the public support test of block (h) or block (i). We would like the Internal Revenue Service to decide the proper classification.	Sections 509(a)(1) and 170(b)(1)(A)(vi) or Section 509(a)(2)

If you checked one of the boxes (a) through (f) in question 9, go to question 14.
If you checked box (g) in question 9, go to questions 11 and 12.
If you checked box (h), (i), or (j), go to question 10.

Part III Technical Requirements *(Continued)*

10 If you checked box (h), (i), or (j) in question 9, have you completed a tax year of at least 8 months?

☐ Yes—Indicate whether you are requesting:

☐ A definitive ruling (Answer questions 11 through 14.)

☐ An advance ruling (Answer questions 11 and 14 and attach 2 Forms 872-C completed and signed.)

☒ No—You must request an advance ruling by completing and signing 2 Forms 872-C and attaching them to your application.

11 If the organization received any unusual grants during any of the tax years shown in Part IV-A, attach a list for each year showing the name of the contributor; the date and the amount of the grant; and a brief description of the nature of the grant.

N/A

12 If you are requesting a definitive ruling under section 170(b)(1)(A)(iv) or (vi), check here ▶ ☐ and:

a Enter 2% of line 8, column (e) of Part IV-A ______________

b Attach a list showing the name and amount contributed by each person (other than a governmental unit or "publicly supported" organization) whose total gifts, grants, contributions, etc., were more than the amount you entered on line 12a above.

13 If you are requesting a definitive ruling under section 509(a)(2), check here ▶ ☐ and:

a For each of the years included on lines 1, 2, and 9 of Part IV-A, attach a list showing the name of and amount received from each "disqualified person."

b For each of the years included on line 9 of Part IV-A, attach a list showing the name of and amount received from each payer (other than a "disqualified person") whose payments to the organization were more than $5,000. For this purpose, "payer" includes, but is not limited to, any organization described in sections 170(b)(1)(A)(i) through (vi) and any governmental agency or bureau.

14 Indicate if your organization is one of the following. If so, complete the required schedule. (Submit only those schedules that apply to your organization. Do not submit blank schedules.)	Yes	No	If "Yes," complete Schedule:
Is the organization a church?		X	A
Is the organization, or any part of it, a school?		X	B
Is the organization, or any part of it, a hospital or medical research organization?		X	C
Is the organization a section 509(a)(3) supporting organization?		X	D
Is the organization an operating foundation?		X	E
Is the organization, or any part of it, a home for the aged or handicapped?		X	F
Is the organization, or any part of it, a child care organization?		X	G
Does the organization provide or administer any scholarship benefits, student aid, etc.?	X		H
Has the organization taken over, or will it take over, the facilities of a "for profit" institution?		X	I

Part IV **Financial Data**

Complete the financial statements for the current year and for each of the 3 years immediately before it. If in existence less than 4 years, complete the statements for each year in existence. **If in existence less than 1 year, also provide proposed budgets for the 2 years following the current year.** See attached Exhibit F for projected budgets for tax years ending June 30, 1992, 1993 & 1994.

A.—Statement of Revenue and Expenses

		Current tax year	3 prior tax years or proposed budget for 2 years			
		(a) From .... to	(b) 19	(c) 19	(d) 19	(e) TOTAL
Revenue	1 Gifts, grants, and contributions received (not including unusual grants—see instructions) . .					
	2 Membership fees received . .					
	3 Gross investment income (see instructions for definition) . .					
	4 Net income from organization's unrelated business activities not included on line 3					
	5 Tax revenues levied for and either paid to or spent on behalf of the organization					
	6 Value of services or facilities furnished by a governmental unit to the organization without charge (not including the value of services or facilities generally furnished the public without charge)					
	7 Other income (not including gain or loss from sale of capital assets) (attach schedule) . .					(
	8 Total (add lines 1 through 7) .					
	9 Gross receipts from admissions, sales of merchandise or services, or furnishing of facilities in any activity that is not an unrelated business within the meaning of section 513					
	10 Total (add lines 8 and 9) . . .					
	11 Gain or loss from sale of capital assets (attach schedule) . . .					
	12 Unusual grants					
	13 Total revenue (add lines 10 through 12)					
Expenses	14 Fundraising expenses					
	15 Contributions, gifts, grants, and similar amounts paid (attach schedule) . .					
	16 Disbursements to or for benefit of members (attach schedule) .					
	17 Compensation of officers, directors, and trustees (attach schedule)					
	18 Other salaries and wages . . .					
	19 Interest					
	20 Occupancy (rent, utilities, etc.) .					
	21 Depreciation and depletion . .					
	22 Other (attach schedule) . . .					
	23 Total expenses (add lines 14 through 22)					
	24 Excess of revenue over expenses (line 13 minus line					

Part IV **Financial Data** *(Continued)*

	B.—Balance Sheet (at the end of the period shown)		Current tax year Date ....
	Assets		
1	Cash	1	
2	Accounts receivable, net	2	
3	Inventories	3	
4	Bonds and notes receivable (attach schedule)	4	
5	Corporate stocks (attach schedule)	5	
6	Mortgage loans (attach schedule)	6	
7	Other investments (attach schedule)	7	
8	Depreciable and depletable assets (attach schedule)	8	
9	Land	9	
10	Other assets (attach schedule)	10	
11	**Total assets** (add lines 1 through 10)	11	
	Liabilities		
12	Accounts payable	12	
13	Contributions, gifts, grants, etc., payable	13	
14	Mortgages and notes payable (attach schedule)	14	
15	Other liabilities (attach schedule)	15	
16	**Total liabilities** (add lines 12 through 15)	16	
	Fund Balances or Net Assets		
17	Total fund balances or net assets	17	
18	**Total liabilities and fund balances or net assets** (add line 16 and line 17)	18	

If there has been any substantial change in any aspect of your financial activities since the end of the period shown above, check the box and attach a detailed explanation ▶ ☐

Schedule H.—Organizations Providing Scholarship Benefits, Student Aid, Etc., to Individuals

1a Describe the nature and the amount of the scholarship benefit, student aid, etc., including the terms and conditions governing its use, whether a gift or a loan, and how the availability of the scholarship is publicized. If the organization has established or will establish several categories of scholarship benefits, identify each kind of benefit and explain how the organization determines the recipients for each category. Attach a sample copy of any application the organization requires individuals to complete to be considered for scholarship grants, loans, or similar benefits. (Private foundations that make grants for travel, study, or other similar purposes are required to obtain advance approval of scholarship procedures. See Regulations sections 53.4945-4(c) and (d).)

See attached Exhibit G.

b If you want this application considered as a request for approval of grant procedures in the event we determine that you are a private foundation, check here . . . . ▶ ☒

c If you checked the box in 1b above, indicate the sections for which you wish to be considered.

☒ 4945(g)(1)   ☐ 4945(g)(2)   ☐ 4945(g)(3)

2 What limitations or restrictions are there on the class of individuals who are eligible recipients? Specifically explain whether there are, or will be, any restrictions or limitations in the selection procedures based upon race or the employment status of the prospective recipient or any relative of the prospective recipient. Also indicate the approximate number of eligible individuals.

See attached Exhibit G.

3 Indicate the number of grants you anticipate making annually . . . . ▶ 500-1000

4 If you base your selections in any way on the employment status of the applicant or any relative of the applicant, indicate whether there is or has been any direct or indirect relationship between the members of the selection committee and the employer. Also indicate whether relatives of the members of the selection committee are possible recipients or have been recipients.

The employment status of the applicant or any relative of the applicant is not a selection criteria. Relatives of the Corporation's directors or officers or members of any selection committee will not be eligible for scholarships provided by the Corporation.

5 Describe any procedures you have for supervising grants (such as obtaining reports or transcripts) that you award, and any procedures you have for taking action if the terms of the grant are violated.

No supervision policies or procedures exist currently or are planned because the selection criteria are expected to be limited simply to financial need, residence, and grade level.

The Corporation expects that its scholarships will be paid directly to schools described in Code section 170(b)(1)(A)(ii) of each student's choice. Moreover, the Corporation intends to require and obtain reports and information on each student necessary to fulfill the requirements of Treasury Regulations section 53.4945-4(c).

For more information, see back of Schedule H.

Form **2848**
(Rev. March 1991)
Department of the Treasury
Internal Revenue Service

Power of Attorney and Declaration of Representative

► For Paperwork Reduction and Privacy Act Notice, see the instructions.

OMB No. 1545-0150
Expires 5-31-93

Part I **Power of Attorney**

1 Taxpayer Information

Taxpayer name(s) and address (Please type or print.) Educational CHOICE Charitable Trust, Inc. Golden Rule Building 7440 Woodland Drive Indianapolis, Indiana 46278-1719	**Social security number(s)** N/A	**Employer identification number** Applied for
	Daytime telephone number (317) 297-4123	**Plan number (if applicable)** N/A

hereby appoint(s) the following representative(s) as attorney(s)-in-fact:

2 Representative(s) (Please type or print.)

Name and address Ben W. Blanton Baker & Daniels, 300 N. Meridian St., Suite 2700 Indianapolis, Indiana 46204	CAF No. 4005-21486R Telephone No. (317) 237-0300 Fax No. (317) 237-1000 Check if new: Address ☐ Telephone No ☐
Name and address Paul Lowell Haines Baker & Daniels, 300 N. Meridian St., Suite 2700 Indianapolis, Indiana 46204	CAF No. None Telephone No. (317) 237-0300 Fax No. (317) 237-1000 Check if new: Address ☐ Telephone No ☐
Name and address	CAF No. Telephone No. ( ) Fax No. ( ) Check if new: Address ☐ Telephone No. ☐

to represent the taxpayer(s) before the Internal Revenue Service for the following tax matters:

3 Tax Matters

Type of Tax (Income, Employment, Excise, etc.)	Tax Form Number (1040, 941, 720, etc.)	Year(s) or Period(s)
Application for Recognition of Exemption Under 501(c)(3)	1023	1991-1992
Application for EIN	SS-4	1991-1992
User Fee for Exempt Organization Determination Letter Request	8718	1991-1992

4 Specific Use Not Recorded on Centralized Authorization File (CAF).—If the power of attorney is for a specific use not recorded on CAF, please check this box. (See the instructions for *Specific Use Not Recorded on CAF* on page 4.) . . . . ► ☐

5 Acts Authorized.—The representatives are authorized to receive and inspect confidential tax information and to perform any and all acts that I can perform with respect to the tax matters described in line 3, for example, the authority to sign any agreements, consents, or other documents. The authority does not include the power to receive refund checks or the power to sign certain returns. (See instructions.)

List any specific additions or deletions to the acts otherwise authorized in this power of attorney: ....

Note: *In general, an unenrolled preparer of tax returns cannot sign any document for a taxpayer. See Revenue Procedure 81-38, printed as Pub. 470, for more information.*

Note: *The tax matters partner/person of a partnership or S corporation is not permitted to authorize representatives to perform certain acts. See the instructions for more information.*

6 Receipt of Refund Checks.—If you want to authorize a representative named in line 2 to receive, BUT NOT TO ENDORSE OR CASH, refund checks, initial here ____________ and list the name of that representative below.

Name of representative to receive refund check(s) ►

Form **SS-4**
(Rev. April 1991)
Department of the Treasury
Internal Revenue Service

Application for Employer Identification Number

(For use by employers and others. Please read the attached instructions before completing this form.)

EIN

OMB No. 1545-0003
Expires 4-30-94

Please type or print clearly.

1 Name of applicant (True legal name) (See instructions.)
Educational CHOICE Charitable Trust, Inc.

2 Trade name of business, if different from name in line 1
Same

3 Executor, trustee, "care of" name
J. Patrick Rooney

4a Mailing address (street address) (room, apt., or suite no.)
Golden Rule Bldg., 7440 Woodland Drive

5a Address of business (See instructions.)
Golden Rule Bldg., 7440 Woodland Drive

4b City, state, and ZIP code
Indianapolis, IN 46278-1719

5b City, state, and ZIP code
Indianapolis, IN 46278-1719

6 County and state where principal business is located
Marion County, Indiana

7 Name of principal officer, grantor, or general partner (See instructions.) ►
J. Patrick Rooney, President

8a Type of entity (Check only one box.) (See instructions.)
☐ Individual SSN
☐ REMIC
☐ Personal service corp.
☐ State/local government
☐ National guard
☒ Other nonprofit organization (specify) educational and charitable organization
☐ Other (specify) ►
☐ Estate
☐ Plan administrator SSN
☐ Other corporation (specify)
☐ Federal government/military
☐ Trust
☐ Partnership
☐ Farmers' cooperative
☐ Church or church controlled organization
If nonprofit organization enter GEN (if applicable)

8b If a corporation, give name of foreign country (if applicable) or state in the U.S. where incorporated ►
Foreign country
State Indiana

9 Reason for applying (Check only one box.)
☒ Started new business
☐ Hired employees
☐ Created a pension plan (specify type) ►
☐ Banking purpose (specify) ►
☐ Changed type of organization (specify) ►
☐ Purchased going business
☐ Created a trust (specify) ►
☐ Other (specify) ►

10 Date business started or acquired (Mo., day, year) (See instructions.)
August 16, 1991

11 Enter closing month of accounting year. (See instructions.)
June

12 First date wages or annuities were paid or will be paid (Mo., day, year). Note: *If applicant is a withholding agent, enter date income will first be paid to nonresident alien. (Mo., day, year)* ► None

13 Enter highest number of employees expected in the next 12 months. Note: *If the applicant does not expect to have any employees during the period, enter "0."* ►

Nonagricultural	Agricultural	Household
0	0	0

14 Principal activity (See instructions.) ► charitable organization - educational scholarships to needy studen

15 Is the principal business activity manufacturing? ☐ Yes ☒ No
If "Yes," principal product and raw material used ►

16 To whom are most of the products or services sold? Please check the appropriate box.
☐ Public (retail) ☐ Other (specify) ► ☐ Business (wholesale) ☒ N/A

17a Has the applicant ever applied for an identification number for this or any other business? ☐ Yes ☒ No
Note: *If "Yes," please complete lines 17b and 17c.*

17b If you checked the "Yes" box in line 17a, give applicant's true name and trade name, if different than name shown on prior application.
True name ►
Trade name ►

17c Enter approximate date, city, and state where the application was filed and the previous employer identification number if known.

Approximate date when filed (Mo., day, year)	City and state where filed	Previous EIN

Under penalties of perjury, I declare that I have examined this application, and to the best of my knowledge and belief, it is true, correct, and complete.

Telephone number (include area code) (317) 297-4123

Name and title (Please type or print clearly.) ► John M. Whelan, Treasurer

Signature ►
Date ► 8/16/91

Note: *Do not write below this line.* For official use only.

Please leave blank ►	Geo.	Ind.	Class	Size	Reason for applying

For Paperwork Reduction Act Notice, see attached instructions.
Cat No 16055N
Form SS-4 (Rev 4-91)

Form **8718**
(Rev October 1990)
Department of the Treasury
Internal Revenue Service

User Fee for Exempt Organization Determination Letter Request

▶ Attach this form to determination letter application.
(Form 8718 is NOT a determination letter application)

For IRS Use Only
Control number ____________
Amount paid ____________
User fee screener ____________

1 Name of organization
Educational CHOICE Charitable Trust, Inc.

2 Type of request (check only one box and include a check or money order made payable to Internal Revenue Service for the amount of the indicated fee): — Fee

a ☐ Initial request for an exempt organization determination letter (do NOT use for a pension plan determination letter) by an organization whose annual gross receipts have not exceeded (or are not expected to exceed) $10,000, averaged over the preceding four taxable years, or new organizations which anticipate annual gross receipts averaging not more than $10,000 during their first four years. If you check this box you must complete the income certification below . . . . $ 150

Certification

I hereby certify that the annual gross receipts of .... (enter name of organization) have not exceeded (or are not expected to exceed) $10,000, averaged over the preceding four (or the first four) years of operation.

Signature ▶ .... Title ....

b ☒ Initial request for an exempt organization determination letter (do NOT use for a pension plan determination letter) by an organization whose annual gross receipts have exceeded (or are expected to exceed) $10,000, averaged over the preceding four taxable years, or a new organization which anticipates annual gross receipts averaging more than $10,000 during their first four years . . . . . . $ 375

c ☐ Private foundation which has completed a section 507 termination and which seeks a determination letter that it is now a public charity . . . . $ 200

d ☐ Group exemption letters . . . . $ 500

Instructions

The Omnibus Budget Reconciliation Act of 1990 requires payment of a user fee for determination letter requests submitted to the Internal Revenue Service. The fee must accompany each request submitted to a key district office.

The fee for each type of request for an exempt organization determination letter is listed in item 2 of this form. Check the block that describes the type of request you are submitting, and attach this form to the front of your request form along with a check or money order for the amount indicated. Make the check or money order payable to the Internal Revenue Service.

Determination letter requests received with no payment or with an insufficient payment will be returned to the applicant for submission of the proper fee. To avoid delays in receiving a determination letter, be sure that your application is sent to the applicable address shown below. These addresses supersede the addresses listed in Publication 557 and all application forms.

If entity is in this IRS District ▼	Send fee and request for determination letter to this address ▼
Albany, Augusta, Boston, Brooklyn, Buffalo, Burlington, Hartford, Manhattan, Portsmouth, Providence	Internal Revenue Service EP/EO Division P O Box 1680, GPO Brooklyn, NY 11202
Baltimore, District of Columbia, Pittsburgh, Richmond, Newark, Philadelphia, Wilmington, any U.S possession or foreign country	Internal Revenue Service EP/EO Division P O Box 17010 Baltimore, MD 21203
Cincinnati, Cleveland, Detroit, Indianapolis, Louisville, Parkersburg	Internal Revenue Service EP/EO Division P O Box 3159 Cincinnati, OH 45201
Albuquerque, Austin, Cheyenne, Dallas, Denver, Houston, Oklahoma City, Phoenix, Salt Lake City, Wichita	Internal Revenue Service EP/EO Division Mail Code 4950 DAL 1100 Commerce Street Dallas, TX 75242
Atlanta, Birmingham, Columbia, Ft Lauderdale, Greensboro, Jackson, Jacksonville, Little Rock, Nashville, New Orleans	Internal Revenue Service EP/EO Division P O Box 941 Atlanta, GA 30370
Anchorage, Boise, Las Vegas, Los Angeles, Honolulu, Portland, Laguna Niguel, San Jose, Seattle	Internal Revenue Service EO Application Receiving Room 5127, P O Box 486 Los Angeles, CA 90053-0486
Sacramento, San Francisco	Internal Revenue Service EO Application Receiving Stop SF 4446 P O Box 36001 San Francisco, CA 94102
Aberdeen, Chicago, Des Moines, Fargo, Helena, Milwaukee, Omaha, St. Louis, St. Paul, Springfield	Internal Revenue Service EP/EO Division 230 S. Dearborn DPN 20 5 Chicago, IL 60604

Attach Check or Money Order Here

★U S GPO 1990 0 262 002 40012

Form **872-C**

(Revised 9-90)

Department of the Treasury
Internal Revenue Service

Consent Fixing Period of Limitation Upon Assessment of Tax Under Section 4940 of the Internal Revenue Code

(See instructions on reverse side.)

OMB No. 1545-0056

To be used with Form 1023. Submit in duplicate.

Under section 6501(c)(4) of the Internal Revenue Code, and as part of a request filed with Form 1023 that the organization named below be treated as a publicly supported organization under section 170(b)(1)(A)(vi) or section 509(a)(2) during an advance ruling period,

Educational CHOICE Charitable Trust, Inc.
(Exact legal name of organization as shown in organizing document)

Golden Rule Building, 7440 Woodland Drive,
Indianapolis, Indiana 46278-1719
(Number, street, city or town, state, and ZIP code)

and the District Director of Internal Revenue, or Assistant Commissioner (Employee Plans and Exempt Organizations)

Consent and agree that the period for assessing tax (imposed under section 4940 of the Code) for any of the 5 tax years in the advance ruling period will extend 8 years, 4 months, and 15 days beyond the end of the first tax year.

However, if a notice of deficiency in tax for any of these years is sent to the organization before the period expires, the time for making an assessment will be further extended by the number of days the assessment is prohibited, plus 60 days.

Ending date of first tax year June 30, 1992
(Month, day, and year)

Name of organization (as shown in organizing document) Educational CHOICE Charitable Trust, Inc.	Date 8/16/91
Officer or trustee having authority to sign Signature ▶ John M. Whelan, Treasurer	
For IRS use only	
District Director or Assistant Commissioner (Employee Plans and Exempt Organizations)	Date
By ▶	

For Paperwork Reduction Act Notice, see page 1 of the Form 1023 instructions.

Educational CHOICE Charitable Trust, Inc.
Golden Rule Building
7440 Woodland Drive
Indianapolis, Indiana 46278-1719
Exhibit to Form 1023

(Part II, Activities and Operational
Information, Number 1)

EXHIBIT C

DESCRIPTION OF ACTIVITIES

The activities of the Corporation will revolve around the Corporation's central purpose, that being to provide educational scholarships to students who desire to attend private educational institutions for the quality of their educational programs but are unable to or have difficulty doing so for financial reasons. Initially, the Corporation intends to provide annually five hundred (500) to one thousand (1,000) scholarships to such students who reside in the school district served by the Indianapolis Public Schools system. It is expected that such scholarships will be in an amount sufficient to fund up to one half (50%) of a private school's tuition cost, to a maximum of $800 per student, per year.

In accomplishing its purpose, the Corporation will be involved in the following activities:

1. Publicizing Scholarship Availability and Eligibility Requirements. The Corporation will make every effort to publicize, through various forms of media, information on scholarship availability and eligibility requirements. Press releases will be made to print, radio and television. In addition, publications describing the scholarship program may be

printed and distributed to public and private educational institutions throughout the City of Indianapolis. Examples of articles resulting from press releases to date are attached hereto as part of this Exhibit C.

2. Reviewing Applications. The Corporation will review all applications to ensure applicants satisfy the scholarship criteria. To qualify, the family of a student must be eligible for free or reduced-cost school lunch programs under federal income rules. In the Corporation's first year, it is anticipated that the student also must be a resident of the Indianapolis Public Schools district and must be entering grades K-8 in the 1991-1992 school year. In future years, the Corporation expects to expand to grades K-12. No other requirements or selection criteria initially will exist.

3. Awarding Scholarships. The Corporation will generally award scholarships on a "first come, first served" basis. However, if more qualified applications are received typically than can be funded, a "lottery-based" award system may be implemented.

4. Additional Support. The Corporation will challenge and encourage other businesses and individuals to support its purposes and scholarship program by contributing to the Corporation. This will

be done through the various forms of media and through oral and written communications from the Corporation itself and the members of its Board of Directors. Any contributions received from such businesses or individuals will go, in their entirety, to scholarships for financially needy students desiring a private education.

Educational CHOICE Charitable Trust, Inc.
Golden Rule Building
7440 Woodland Drive
Indianapolis, Indiana 46278-1719
Exhibit to Form 1023

(Part II, Activities and Operational Information, Number 2)

EXHIBIT D

SOURCES OF FINANCIAL SUPPORT

The Corporation will receive $1.2 million over the period of three years from the Golden Rule Insurance Company. Such monies will be used to provide educational scholarships to needy students. In addition, the Golden Rule Insurance Company has committed itself to fund administrative costs of the Corporation and its scholarship program. Other businesses and individuals will contribute to the Corporation's scholarship program, once established, allowing for expansion of the program.

Educational CHOICE Charitable Trust, Inc.
Golden Rule Building
7440 Woodland Drive
Indianapolis, Indiana 46278-1719
Exhibit to Form 1023

(Part II, Activities and Operational
Information, Number 11b)

EXHIBIT E

LIMITATION OF BENEFITS

The Corporation will initially limit the benefits it provides to those students who are (1) Indianapolis residents living within the boundaries of the school district served by the Indianapolis Public Schools system and (2) eligible for free or reduced-cost school lunches under federal income rules. In addition, in the Corporation's first year of operation, 1991-1992, the scholarships provided probably will be limited to those individual students who are entering grades K-8. Scholarships will be awarded on either a "first come, first served" or a "lottery system" basis, depending on how many students apply for the scholarships. Initially, there will be no other requirements limiting the awarding of scholarships.

Educational CHOICE Charitable Trust, Inc.
Golden Rule Building
7440 Woodland Drive
Indianapolis, Indiana 46278-1719
Exhibit to Form 1023

(Part IV, Financial Data)

EXHIBIT F

PROJECTED BUDGET
Year Ending June 30, 1992

SUPPORT AND REVENUE

Gross Contributions, Gifts, Grants, and Similar Amounts Received	$ 810,000
Gross Amounts Derived from Activities Related to Exempt Purpose	-0-
Gross Amounts Received from Sale of Assets, Excluding Inventories	-0-
Interest, Dividends, Rents, and Royalties . .	1,000
Other Revenue	-0-
TOTAL REVENUE AND SUPPORT	$ 811,000

EXPENSES

Fund Raising Expenses	10,000
Contributions, Gifts, Grants, and Similar Amounts Paid	750,000
Compensation of Officers and Directors . . .	-0-
Other Salaries and Wages	40,000
Interest	-0-
Rent	5,000
Supplies, Postage, Telephone	5,000
Miscellaneous	1,000
TOTAL EXPENSES	$ 811,000

Educational CHOICE Charitable Trust, Inc.
Golden Rule Building
7440 Woodland Drive
Indianapolis, Indiana 46278-1719
Exhibit to Form 1023

(Part IV, Financial Data)

EXHIBIT F

PROJECTED BUDGET
Year Ending June 30, 1993

SUPPORT AND REVENUE

Gross Contributions, Gifts, Grants, and Similar Amounts Received	$ 850,500
Gross Amounts Derived from Activities Related to Exempt Purpose	-0-
Gross Amounts Received from Sale of Assets, Excluding Inventories	-0-
Interest, Dividends, Rents, and Royalties	1,050
Other Revenue	-0-
TOTAL REVENUE AND SUPPORT	$ 851,550

EXPENSES

Fund Raising Expenses	10,500
Contributions, Gifts, Grants, and Similar Amounts Paid	787,500
Compensation of Officers and Directors	-0-
Other Salaries and Wages	42,000
Interest	-0-
Rent	5,250
Supplies, Postage, Telephone	5,250
Miscellaneous	1,050
TOTAL EXPENSES	$ 851,550

Educational CHOICE Charitable Trust, Inc.
Golden Rule Building
7440 Woodland Drive
Indianapolis, Indiana 46278-1719
Exhibit to Form 1023

(Part IV, Financial Data)

EXHIBIT F

PROJECTED BUDGET
Year Ending June 30, 1994

SUPPORT AND REVENUE	
Gross Contributions, Gifts, Grants, and Similar Amounts Received	$ 893,025
Gross Amounts Derived from Activities Related to Exempt Purpose	-0-
Gross Amounts Received from Sale of Assets, Excluding Inventories	-0-
Interest, Dividends, Rents, and Royalties . .	1,103
Other Revenue	-0-
TOTAL REVENUE AND SUPPORT	$ 894,128
EXPENSES	
Fund Raising Expenses	11,025
Contributions, Gifts, Grants, and Similar Amounts Paid	826,875
Compensation of Officers and Directors . . .	-0-
Other Salaries and Wages	44,100
Interest	-0-
Rent	5,513
Supplies, Postage, Telephone	5,513
Miscellaneous	1,102
TOTAL EXPENSES	$ 894,128

(Schedule H--Organizations Providing
Scholarship Benefits, Student Aid, Etc., to Individuals)

EXHIBIT G

GENERAL NATURE, TERMS, AND CONDITIONS OF SCHOLARSHIP

As previously described in Exhibit C to this Form 1023, the Corporation initially will provide five hundred (500) to one thousand (1,000) scholarships to students who desire to attend private educational institutions, because of the quality of their programs. Scholarships are expected to be in an amount sufficient to fund up to one half (50%) of a private educational institution's tuition cost, to a maximum of $800 per student, per year. Scholarships are generally intended to be awarded to students in the public school system who are dissatisfied with the quality of the educational program provided and who would attend a private educational institution if it were financially feasible. However, up to fifty percent (50%) of the scholarships awarded may go to students currently attending private educational institutions, if they satisfy the selection criteria.

Scholarships will be awarded on a "first come, first served" basis. However, if more qualified applications are received than can be funded, a "lottery-based" award system may be implemented.

Once awarded, scholarship monies will be paid to the private educational institution of the student's choice, provided the school is a private school located in or around the City of

Indianapolis. The scholarship will be considered a grant that need not be repaid.

To qualify for the scholarship, a student must be eligible for free or reduced-cost school lunch programs under federal income rules. In addition, it is anticipated initially that the student must be entering grades K-8 in the 1991-1991 school year and must be a resident of the school district served by the Indianapolis Public Schools system. The application form to be used by the Corporation is in the process of being created.

The availability of the scholarships will be publicized in various media. Press releases will be made to print, radio and television. Copies of articles resulting from such a press release are attached herewith as part of Exhibit C. In addition, the Corporation may print publications describing the scholarships for distribution to the public.

LIMITATIONS AND RESTRICTIONS

There will be no restrictions or limitations in the selection procedures based upon the race or employment status of the prospective recipient or any relative of the prospective recipient. Rather, as previously noted, the scholarships are expected to be available to all students who are:

1. Eligible for free or reduced-cost school lunch programs under federal income rules;
2. Entering grades K-12 in the applicable school year (particularly after the initial year); and

3. Residing in the school district served by the Indianapolis Public Schools system.

The number of students eligible for the scholarship will vary each year with the number of students who satisfy the selection criteria listed above.

INTERNAL REVENUE SERVICE
DISTRICT DIRECTOR
P. O. BOX 2508
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date: NOV 27 1991

EDUCATIONAL CHOICE CHARITABLE TRUST
INC
C/O BEN N BLANTON
BAKER & DANIELS
300 N MERIDIAN ST STE 2700
INDIANAPOLIS, IN 46204

Employer Identification Number:
35-1836687
Contact Person:
KIM NGUYEN
Contact Telephone Number:
(513) 684-3578

Accounting Period Ending:
June 30
Foundation Status Classification:
509(a)(1)
Advance Ruling Period Begins:
August 16, 1991
Advance Ruling Period Ends:
June 30, 1996
Addendum Applies:
No

Dear Applicant:

Based on information supplied, and assuming your operations will be as stated in your application for recognition of exemption, we have determined you are exempt from Federal income tax under section 501(a) of the Internal Revenue Code as an organization described in section 501(c)(3).

Because you are a newly created organization, we are not now making a final determination of your foundation status under section 509(a) of the Code. However, we have determined that you can reasonably be expected to be a publicly supported organization described in sections 509(a)(1) and 170(b)(1)(A)(vi).

Accordingly, you will be treated as a publicly supported organization, and not as a private foundation, during an advance ruling period. This advance ruling period begins and ends on the dates shown above.

Within 90 days after the end of your advance ruling period, you must submit to us information needed to determine whether you have met the requirements of the applicable support test during the advance ruling period. If you establish that you have been a publicly supported organization, you will be classified as a section 509(a)(1) or 509(a)(2) organization as long as you continue to meet the requirements of the applicable support test. If you do not meet the public support requirements during the advance ruling period, you will be classified as a private foundation for future periods. Also, if you are classified as a private foundation, you will be treated as a private foundation from the date of your inception for purposes of sections 507(d) and 4940.

Grantors and contributors may rely on the determination that you are not a private foundation until 90 days after the end of your advance ruling period. If you submit the required information within the 90 days, grantors and contributors may continue to rely on the advance determination until the Service makes a final determination of your foundation status.

If notice that you will no longer be treated as a publicly supported organization is published in the Internal Revenue Bulletin, grantors and contributors may not rely on this determination after the date of such publication. In addition, if you lose your status as a publicly supported organization and a grantor or contributor was responsible for, or was aware of, the act or failure to act, that resulted in your loss of such status, that person may not rely on this determination from the date of the act or failure to act. Also, if a grantor or contributor learned that the Service had given notice that you would be removed from classification as a publicly supported organization, then that person may not rely on this determination as of the date such knowledge was acquired.

If your sources of support, or your purposes, character, or method of operation change, please let us know so we can consider the effect of the change on your exempt status and foundation status. In the case of an amendment to your organizational document or bylaws, please send us a copy of the amended document or bylaws. Also, you should inform us of all changes in your name or address.

As of January 1, 1984, you are liable for taxes under the Federal Insurance Contributions Act (social security taxes) on remuneration of $100 or more you pay to each of your employees during a calendar year. You are not liable for the tax imposed under the Federal Unemployment Tax Act (FUTA).

Organizations that are not private foundations are not subject to the private foundation excise taxes under Chapter 42 of the Code. However, you are not automatically exempt from other Federal excise taxes. If you have any questions about excise, employment, or other Federal taxes, please let us know.

Donors may deduct contributions to you as provided in section 170 of the Code. Bequests, legacies, devises, transfers, or gifts to you or for your use are deductible for Federal estate and gift tax purposes if they meet the applicable provisions of sections 2055, 2106, and 2522 of the Code.

Contribution deductions are allowable to donors only to the extent that their contributions are gifts, with no consideration received. Ticket purchases and similar payments in conjunction with fundraising events may not necessarily qualify as deductible contributions, depending on the circumstances. See Revenue Ruling 67-246, published in Cumulative Bulletin 1967-2, on page 104, which sets forth guidelines regarding the deductibility, as charitable contributions, of payments made by taxpayers for admission to or other participation in fundraising activities for charity.

You are required to file Form 990, Return of Organization Exempt From Income Tax, only if your gross receipts each year are normally more than $25,000. However, if you receive a Form 990 package in the mail, please file the return even if you do not exceed the gross receipts test. If you are not required to file, simply attach the label provided, check the box in the heading to indicate that your annual gross receipts are normally $25,000 or less, and sign the return.

If a return is required, it must be filed by the 15th day of the fifth month after the end of your annual accounting period. A penalty of $10 a day is charged when a return is filed late, unless there is reasonable cause for the delay. However, the maximum penalty charged cannot exceed $5,000 or 5 percent of your gross receipts for the year, whichever is less. This penalty may also be charged if a return is not complete, so please be sure your return is complete before you file it.

You are not required to file Federal income tax returns unless you are subject to the tax on unrelated business income under section 511 of the Code. If you are subject to this tax, you must file an income tax return on Form 990-T, Exempt Organization Business Income Tax Return. In this letter we are not determining whether any of your present or proposed activities are unrelated trade or business as defined in section 513 of the Code.

You need an employer identification number even if you have no employees. If an employer identification number was not entered on your application, a number will be assigned to you and you will be advised of it. Please use that number on all returns you file and in all correspondence with the Internal Revenue Service.

If distributions are made to individuals, case histories regarding the recipients should be kept showing names, addresses, purposes of awards, manner of selection, relationship (if any) to members, officers, trustees or donors of funds to you, so that any and all distributions made to individuals can be substantiated upon request by the Internal Revenue Service. (Revenue Ruling 56-304, C.B. 1956-2, page 306.)

If we have indicated in the heading of this letter that an addendum applies, the addendum enclosed is an integral part of this letter.

Because this letter could help resolve any questions about your exempt status and foundation status, you should keep it in your permanent records.

If you have any questions, please contact the person whose name and telephone number are shown in the heading of this letter.

Sincerely yours,

Don H. Williams
District Director

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Resize or reformat an image; move to a field, record, or value; pick a form.
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¤           Children's Educational Opportunities (CEO) Foundation #       1
¤áááááááááááááááááááááááááááááááááááááááááááááááááááááááááááááááááááááááááááááá¤
¤ STUDENT: Pavon           , Diana        M      Entering Grade:     2       ¤
¤          1234 Main Street                           Birthdate: 10/01/86    ¤
¤          San Antonio      TX 78228          Application Rec'd:  4/16/92    ¤
¤          (H): 444-1234                         Voucher Mailed:             ¤
¤          In Home: Parents: 1  Siblings:     School Form Rec'd:             ¤
¤          In Pgm: Siblings: 0    Voucher Status: ACC  S-Approval: CON       ¤
¤                                                                            ¤
¤ SCHOOL:  Westside Catholic School        Annual School Tuition:   850.00   ¤
¤  76      314 Merida                     Annual CEO Scholarship:   425.00   ¤
¤ Type:    San Antonio      TX 78207             Monthly Payment:    42.50   ¤
¤ P/P:Pvt  224-2450                              Payment History:            ¤
¤                                                        1992-3:             ¤
¤  TEST SCORES:                                          1993-4:             ¤
¤  '92          '93          '94          '95            1994-5:             ¤
¤                                                                            ¤
¤  NOTES: Diana and her grandfather were honored guests at the               ¤
¤         White House ceremonies on June 25, 1992.                           ¤
¤                                                                            ¤
¤                                                             Select:        ¤
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Editing Students table with form F: Record 882 of 883              Edit  ë

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¤           Children's Educational Opportunities (CEO) Foundation # 1000661  ¤
¤áááááááááááááááááááááááááááááááááááááááááááááááááááááááááááááááááááááááááááááá¤
¤ STUDENT: Lopez           , Manuel                Entering Grade:     3     ¤
¤          502 West Avenue                            Birthdate:  2/21/84    ¤
¤          San Antonio      TX 78213          Application Rec'd:  7/27/92    ¤
¤          (H): 344-5511                         Voucher Mailed:  7/29/92    ¤
¤          In Home: Parents: 1  Siblings:     School Form Rec'd:  8/12/92    ¤
¤          In Pgm: Siblings: 0    Voucher Status: ACC  S-Approval: CON       ¤
¤                                                                            ¤
¤ SCHOOL:  St. Mary Magdalen School        Annual School Tuition: 1,100.00   ¤
¤  58      1700 Clower                    Annual CEO Scholarship:   550.00   ¤
¤ Type:    San Antonio      TX 78201             Monthly Payment:    55.00   ¤
¤ P/P:Pub  735-1381                              Payment History:            ¤
¤                                                        1992-3:             ¤
¤  TEST SCORES:                                          1993-4:             ¤
¤  '92          '93          '94          '95            1994-5:             ¤
¤                                                                            ¤
¤  NOTES: Parents recently divorced.                                         ¤
¤         Permanent address above is Mother's brother.                       ¤
¤         Mother's new temporary address is 35021 Pine Oak, #7312          ¤
¤         San Antonio, TX 78201                               Select:        ¤
àëëëëëëëëëëëëëëëëëëëëëëëëëëëëëëëëëëëëëëëëëëëëëëëëëëëëëëëëëëëëëëëëëëëëëëëëëëëëëë¥
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CEO FOUNDATION STATISTICS

02-Sep-92

CATEGORY	STUDENTS	PERCENT	CEO ANNUAL $ COMMITMENT	PERCENT	AVERAGE VOUCHER
Private	492	55.47%	$249,248.40	51.72%	$507
Public	395	44.53%	$232,668.25	48.28%	$589
TOTAL	887	100.00%	$481,916.65	100.00%	$543

DENOMINATION	STUDENTS	PERCENT
Adventist, Seventh Day	7	0.79%
Baptist	72	8.12%
Catholic	542	61.10%
Church of Christ	1	0.11%
Church of God	3	0.34%
Episcopal	2	0.23%
Inter-Denominational	36	4.06%
Jewish	8	0.90%
Lutheran	10	1.13%
Methodist	2	0.23%
Nazarene	12	1.35%
Non-Denominational	169	19.05%
Pentecostal	12	1.35%
Non Religous	11	1.24%
TOTAL	887	100.00%

GRADE LEVEL	STUDENTS	PERCENT
1	114	12.85%
2	136	15.33%
3	117	13.19%
4	102	11.50%
5	110	12.40%
6	130	14.66%
7	103	11.61%
8	75	8.46%
TOTAL	887	100.00%

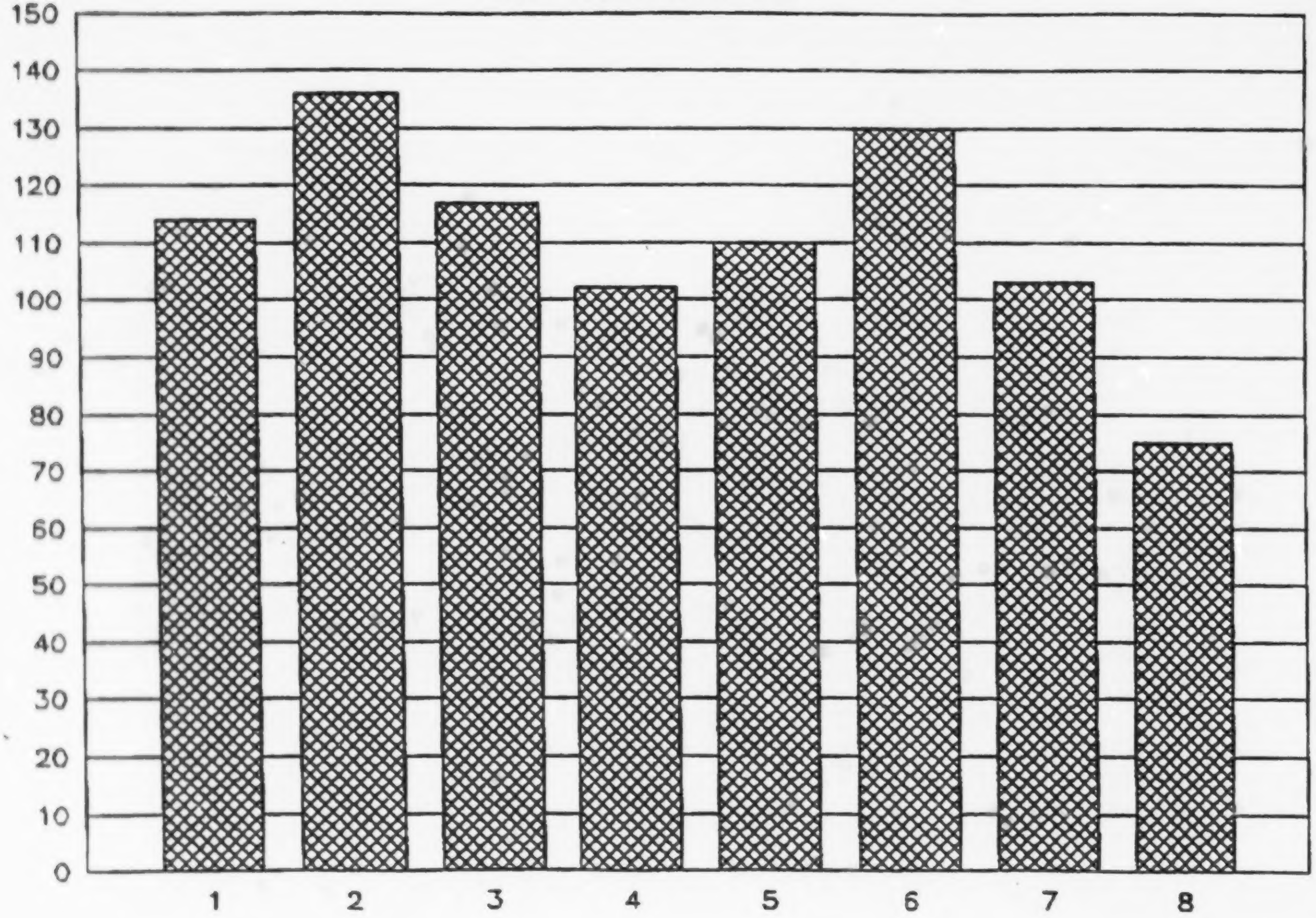
WAIT LIST	STUDENTS	PERCENT
Private	994	96.60%
Public	35	3.40%
TOTAL	1029	100.00%

ADDITIONAL INFORMATION:

NUMBER OF SCHOOLS:	76	REFUSED/DECLINED	315
APPLICATIONS RECEIVED:	2252	HISPANIC SURNAME	74.9%

CEO STUDENTS – GRADE LEVEL

1992–1993 School Year



CEO FOUNDATION
P.O. Box 17447
San Antonio, TX 78217
(512) 829-0305

8/10/92 Annual Scholarship Projections Page 1

St. Gregory The Great School
700 Dewhurst
San Antonio TX 78213

(48)
342-0281

STUDENT #	STUDENT NAME	GRADE	ANNUAL AMOUNT	APPLICATION CONFIRMED
1000346	Almarez, Robert D.	1	600.00	CON
408	Flores, Consuelo	8	600.00	CON
100084	Garay, Joseph D	3	600.00	CON
91	Hernandez, Erica	7	600.00	CON
1000416	Jimenez, Crystal M.	4	600.00	CON
1000188	Martinez, Melissa A	1	665.00	CON
1000189	Martinez, Christy M	5	665.00	CON
31	Montez, Karisa A	1	500.00	CON
32	Montez, Christopher A	4	500.00	CON
1000423	Munoz, John A	1	600.00	CON
1000129	Ruiz, Vanessa M	1	600.00	CON
1000213	Winans, James D	5	600.00	CON

TOTAL: 7,130.00
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N=12

CHILDREN'S EDUCATIONAL OPPORTUNITY FOUNDATION
PUBLIC RELATIONS AND MEDIA REQUIREMENTS
REQUEST FOR PROPOSAL

You are invited to respond to this RFP for a confidential project entitled Children's Educational Opportunity Foundation. Since it is to be considered highly confidential, no outside individuals or suppliers are to be contacted or used in your presentation.

THE PROJECT

The CEO Foundation is considering a program to offer need based elementary school tuition scholarships to low-to-middle income families who wish to send their child to a private school of their choice. The goal of the program is to assist 500-700 children for a minimum three year period beginning in the fall of 1992. Acceptance into the program will be on a first come first served basis. Funding will be provided by Chief Executive Officers (CEO's) of local corporations.

REQUEST FOR PROPOSAL

You are invited to submit a proposal for public relations and image assistance for this project. This assistance will include, at the minimum:

1. A kick-off press conference and news briefing;
2. Media training/preparation for above;
3. A plan to maximize media attention/exposure for the announcement;
4. Follow-up needed to continue public awareness and image enhancement; and,
5. Ideas/concepts for establishing a long term image for the foundation.

We request that your proposal consist of a cover letter generally describing how you propose to approach our media needs and identifying the personnel involved and their qualifications. A specific plan of action would be helpful but not required.

Also included in the proposal should be a plan to evaluate the effectiveness of your proposed strategy.

DEADLINE/PRESENTATION DATE

Written proposals (two copies required) must be submitted during presentations scheduled for February 21, 1992 at 8926 Tesoro Drive (the Tesoro Building), Suite 114, telephone 829-7138, for the time noted on the following page. You will be allowed a total of thirty minutes for your presentation and questions/answers. No advance copies of the proposal are needed. A decision on the engagement is planned within the week following.

BUDGET

The budget for this project is $5,000.00 including all expenses for pubic relations and creative assistance. If you feel additional dollars are needed, state the amount and justification. This does not mean however that additional funds are available, but the CEO Foundation would like to hear your ideas.

POINT OF CONTACT

You are welcomed to contact Robert Aguirre at 299-1172 should you have any questions or if you simply wish additional information.

Your presentation has been scheduled for ___________AM.

FOR YOUR INFORMATION

release: August 2, 1991

contact: Timothy Ehrgott
317-297-4123

$1.2 MILLION PLEDGE FROM INSURANCE COMPANY GIVES INNER-CITY CHILDREN ACCESS TO PRIVATE EDUCATION

LAWRENCEVILLE, IL -- Golden Rule Insurance Company will give $1.2 million to test an education voucher program called "CHOICE" that would enable middle and low income parents to send their children to private schools instead of to declining inner city public schools, officials of the Lawrenceville, Illinois company announced Friday. A Chicago-based education consultant called the move a national first for corporate support of choice in education.

J. Patrick Rooney, chairman of the southern Illinois insurance firm, pledged $1.2 million over the next three school years to cover half the private school tuition for each of 500 inner-city Indianapolis students. "We are committed for three years and fully expect to continue with the program through the time each original participant completes eighth grade," Rooney said.

Golden Rule®

Golden Rule Insurance Company
Home Office
Golden Rule Building
Lawrenceville, Illinois 62439
Telephone (618) 943-8000

Golden Rule Insurance Company
Executive Offices
7440 Woodland Drive
Indianapolis, Indiana 46278-1719
Telephone (317) 297-4123

SEP 19 1991

4227-791

Rooney said Indianapolis was chosen as the test city for the CHOICE program because of the low quality of its public schools and because Golden Rule's executive offices are located there, allowing for close monitoring of the project. He said he expects the program to be duplicated in other troubled inner city school systems by corporate and business leaders if the Indianapolis model proves successful.

"This pilot program is a national first for business involvement in the movement for parental choice in education," said Patrick Keleher, president of Chicago-based TEACH America. "Many companies have thrown money at failing public school systems in so-called public-private partnerships. Others have admirably supported effective private inner city schools with funds for operations and scholarships. But this is the first instance I know of in which a company has directly empowered moderate and low income parents, on a large scale, to help their children escape bad city schools."

Golden Rule is establishing what it calls the CHOICE Charitable Trust to administer the Indianapolis program. To qualify, students must be eligible for free or reduced-cost lunches under federal income rules, and be entering grades K-8 in the 1991-1992 school year. Each grant will pay up to

50 percent of tuition in the private Indianapolis school of a participating family's choice, with a cap of $800 per year. The grants will be awarded on a first-come, first-served basis, without academic or other requirements.

If too many apply, the grants will be allocated on a lottery basis. Not more than fifty percent of the grants will be permitted for students already enrolled in private school. The remaining fifty percent will go to new students.

"We are not interested in taking only the best and the brightest out of the public schools," said company president Jack Whelan. "Parents of students at all levels need the economic freedom to choose good schools for their kids. Upper and middle class families can afford to move away from bad urban school systems or send their children to private schools. It's the middle and low income families who are trapped without a way to pay for private schooling."

He then added, "We are interested in helping parents who are willing to make sacrifices for their children's education. This is a helping hand, not a handout."

Whelan said he was optimistic that other businesses and individuals would contribute to the CHOICE Charitable Trust to expand the Indianapolis test to include more students and provide for grants at the high school level. He said Golden Rule would fund all costs of administration, so that contributors could be confident their gifts would go directly for tuitions.

Whelan characterized the program as a challenge to the public education establishment. "If the private sector can prove that inner city students do better when they have the power to choose the schools they will attend, we will strengthen the case for redirecting public education funds into the hands of parents in the form of vouchers. When all families, no matter how poor, have the freedom to walk away from bad public schools and take their tax dollars with them, the public schools will be forced to improve."

Such an experiment with public funds is already underway in Milwaukee, Wisconsin, where up to 1,000 Milwaukee public school students are allowed to use state-funded vouchers for private school tuition. That program was sponsored by Wisconsin State Representative Annette "Polly" Williams, who expressed support for Golden Rule's new program.

The commitment to this program is so great at Golden Rule that members of management have volunteered to answer a special phone line after business hours have ended.

The Company's Education Hot Line will be serviced from 8 a.m. until 8 p.m., Monday through Friday, and 8 a.m. until 1 p.m. on Saturday. The phone number is 293-7600.

Golden Rule specializes in health insurance for individuals. The 51-year-old company had premium income of $459 million in 1990.

CEO
FOUNDATION
Children's Educational Opportunity Foundation

Request for
Coverage:

Hold For Release: 4/15/92

10AM, Wednesday,
April 15, 1992

For More Information:
Jeanne Janes, 512-223-6233
Marilyn McDougal, 512-223-6233

NEW $1.5 MILLION EDUCATIONAL PROJECT TO PROVIDE TUITION SCHOLARSHIPS FOR LOW INCOME FAMILIES; LOCAL RESPONSE TO CHALLENGE OF AMERICA 2000

WHO: The CEO Foundation (Children's Educational Opportunities Foundation) represented by Robert Aguirre, Managing Director.

Sponsor representatives include Dr. James Leininger, Kinetic Concepts, Inc.; USAA Federal Savings Bank; Larry Walker, San Antonio Express News.

WHAT: News briefing with details on the project and how families can participate.

WHERE: Westside Branch YMCA, 3030 Ruiz, 433-6391
(West on Culebra to Gen. McMullen; left 2 lights to Ruiz, left again. The YMCA is on your right.)

WHEN: 10 AM, Wednesday, April 15, 1992

WHY: Educational opportunities are limited for low income families and the CEO Foundation has been established to help.

SPECIAL NOTES:

CEO Foundation sponsors include Kinetic Concepts Foundation, USAA Federal Savings Bank, and the San Antonio Express-News.

NEWS CONFERENCE ANNOUNCING THE PARTNERSHIP FOR EDUCATIONAL CHOICE
JUNE 10, 1992
BAY VIEW COMMUNITY CENTER

PARTNERS ADVANCING VALUES IN EDUCATION
By Daniel McKinley, Executive Director

Good Afternoon, my name is Daniel McKinley and I am executive director of PARTNERS ADVANCING VALUES IN EDUCATION, a non-profit group which champions values and excellence in education.

Thank you for being here today for this important announcement.

The Partnership for Educational Choice, sponsored by Partners Advancing Values in Education, aims to help low income families with children in grades K - 8, offset the cost of tuition at the private school of their choice, through a simple program of tuition assistance. We believe that all families, regardless of economic circumstance, deserve equal access to educational opportunities for their children. We also believe that parents are the primary educators of their children, who deserve -- and are capable of exercising -- full and free choice among the broadest possible range of educational options.

Currently, low income families enjoy few educational alternatives. With limited resources, most of them must settle for whatever is offered solely within the public school system. A few children are able to attend a handful of strictly non-sectarian schools, through the Milwaukee Parental Choice program. The Partnership, by contrast, will give low income parents the same option available to well-to-do parents, namely, to choose the school they believe will best educate their children from the full range of public and private alternatives.

There are only two criteria for children to qualify for the tuition assistance program:

- the child must live within the Milwaukee Public School district;
- the child must qualify for the free or reduced-cost lunch program.

Tuition assistance through the Partnership will be available to all students, regardless of race, religion or academic background.

This program provides tuition assistance based on need rather than academic achievement. Indeed, it is quite possible for parents of students who have been struggling academically in the public system to be the ones most eager to try an alternative approach to education. Because private contributions may not be able to assist all who wish to apply, this program is strictly first come, first served.

The Partnership will contribute one-half of the tuition of a child in grades K - 8, up to $ 1,000 per student, per year. We believe that it is important to open the door of opportunity to as many families as possible, and as quickly as possible. Our approach allows us to use the necessarily limited resources to provide significant assistance to a broader range of families, and far more important, we regard tuition assistance as a helping hand, not a hand-out. We want families to have a tangible stake in this important educational endeavor. This makes more likely their intense involvement in the education of their children. They will have such a stake, if they are contributing to the cost of school.

Simple, brief and straight-forward application forms and information sheets will be made available at conveniently located neighborhood centers and public libraries throughout Milwaukee. Information and applications also will be available at neighborhood private and parochial schools in the City of Milwaukee. In addition, PAVE maintains a dedicated phone line for parents and others seeking more information about our program.

The schools participating are expected to maintain standards of excellence and to meet the following criteria:

- open enrollment and non-discriminatory policies;
- a commitment to value-based curriculum for children in kindergarten through 8th grade;
- a commitment to educating students from diverse cultural backgrounds;
- a commitment to involving parents in the life of the school, recognizing the parents role as primary educators of their children;
- sound government and fiscal management.

Qualifying for tuition assistance does not guarantee admission to any of these schools, which will apply their customary guidelines for enrollment. Our tuition assistance, however, should help parents overcome financial barriers that may have restricted access before.

The most vital and enduring communities are based around shared beliefs and values, not around geographical boundaries.

The life of Milwaukee has been vastly enriched by our tradition of strong, vibrant ethnic and religious communities centered around such shared values. At the core of each such community -- whether Catholic, African Methodist - Episcopal, Lutheran, Baptist or Jewish -- has been a school, in which parents' commitments and beliefs are passed on to their children. Without that school -- without the prospect of the community's values being passed down to future generations -- a community becomes infeebled, and its prospects for survival diminished. Today, many such community-based schools face an uncertain future for reasons having nothing to do with the quality of education they provide, which often is superb. It is anticipated that our tuition assistance program will help strengthen Milwaukee's community, by strengthening schools through which they pass on their values to future generations. At the same time, it should be clear that our program is not designed to subsidize any particular schools or kinds of schools, but to subsidize parental freedom of choice for all low income Milwaukeeans.

I would now like to turn the podium over to Mr. Michael Joyce, president of the Bradley Foundation. He will share with you the reasons why the Bradley Foundation decided to support the Partnership for Educational Choice with a multi-year commitment.

Children's Education Foundation
2900 Chamblee-Tucker Road • Building Six
Atlanta, Georgia 30341-4128
Telephone (404) 455-6116

NEWS RELEASE

EMBARGOED UNTIL 11:00 a.m., AUGUST 10, 1992

Contact:	Matthew J. Glavin President, Georgia Public Policy Foundation (404) 455-7600	Louise Watley Chairman, Children's Education Foundation (404) 455-6116

Low Income, K - 8th Grade Targeted

Georgia Public Policy Foundation Announces $1 Million Choice Scholarship Program

The Georgia Public Policy Foundation has announced the formation of the Children's Education Foundation (CEF), which will provide scholarship assistance in the form of vouchers to low-income parents who wish to send their children to non-public elementary schools. The Children's Education Foundation has already raised more than $1 million for the program which will begin this September.

For each child accepted for participation in the program, the Children's Education Foundation will provide a voucher equal to one-half of the tuition of any participating school, up to a maximum of $3,000. Parents are responsible for the remainder of the tuition, although some schools may offer additional financial assistance.

Scholarships are available to any children living in the five-county Atlanta metro area (Fulton, DeKalb, Gwinnett, Cobb and Clayton) who are eligible for free or reduced-cost lunches under federal income rules, and will be entering grades K - 8 in the 1992-93 school year.

- more -

CEF Chairman Louise Watley said the goal of the Children's Education Foundation is to help provide low-income families with a full range of educational options.

Watley, a long-time activist in Atlanta's inner-city, noted that the crisis in our schools is particularly threatening for the poor and disadvantaged in our society, because education is the surest route out of poverty and into the mainstream of our society.

Matthew J. Glavin, President of the Georgia Public Policy Foundation, noted that according to the U. S. Department of Education, "the average black or hispanic student attending a *private* grade-school has a 37% better chance of graduating college than the average white student attending *public* grade-school. By providing funds to assist poor families (of any race attending non-public schools), the Children's Education Foundation hopes to expand equality of opportunity in education," Glavin said.

Although GPPF created the scholarship program, CEF is being turned over to an independent Board of Trustees who will have full operating control of all Foundation activities. As a program designed to empower the low-income community, the CEF will be completely governed by members of that community.

While the initial million dollars is a good start, Glavin said he is optimistic that other businesses and individuals will contribute to the Children's Education Foundation to expand the program to include more students and provide grants at the high-school level.

Until August 28th, applications for Children's Education Foundation scholarships can be obtained by calling the CEF HOT LINE from 8 a.m. until 8 p.m., Monday through Friday. The phone number is 455-6116. After August 28 normal business hours apply.

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